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# An evaluation of the preceptions of board development needs in non-profit organizations in Louisiana

Gail A. Hollins

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AN EVALUATION OF THE PERCEPTIONS OF BOARD DEVELOPMENT NEEDS  
IN NON-PROFIT ORGANIZATIONS IN LOUISIANA

A Dissertation

Submitted to the Graduate Faculty of the  
Louisiana State University and  
Agricultural and Mechanical College  
in partial fulfillment of the  
requirements for the degree of  
Doctor of Philosophy

in

The School of Human Resource Education  
and Workforce Development

by

Gail Anita Hollins

B.S.N., Southeastern Louisiana University, 1984

M.S., Louisiana State University, 1989

M.S., Louisiana State University, 2009

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## DEDICATION

“Wisdom is the principal thing; therefore get wisdom: and with all thy getting get understanding”

(Proverbs 4:7, Webster’s Bible Translation).

To the **Lord God Almighty** who lovingly and lavishly gave me the vision, fortitude, and wisdom to achieve this degree. I am eternally humbled by His ardent love for and belief in me!

To my parents, Mr. and Mrs. Alvin (Roxie) Hollins, Sr., who loved and supported me throughout my life and doctoral endeavor. They modeled their love for the Lord, self, family, community, and the world through their volunteerism of 60 years, and their founding of non-profit entities. Also, their avid love for education and lifelong learning was imparted to my siblings and me, and countless others.

To my siblings, Alvin, Jr., Pamela, and Rosalind Hollins, who have stood with me each step of my doctoral education. They celebrated my victories, and strengthened me with their own personal and professional accomplishments, as well as their kind actions and words, prayers, and grand humor!

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To our family pets, who affectionately kept me awake during my studies in the early morning hours!

To each and all of you – **I LOVE AND HONOR YOU!**

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“...society is supported and served by a not-for-profit charitable sector which delivers a range of social welfare services to its citizens... The charitable sector underscores many basic values in...democracy. It exemplifies the principles of pluralism, free choice and the rights of citizens to participate in and take responsibility for their community. It helps ensure that no government has a monopoly on the way society deals with its citizens – especially those who are most vulnerable because of economic or personal need” (*Industry Commission, Report into Charitable Organisations in Australia, 1995*).



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## **ABSTRACT**

The purpose of this study was to determine the perceptions of board members of non-profit organizations in Louisiana on board development. According to the literature review, boards of directors play a pivotal role in the life of non-profit organizations. Thus, it is essential that they operate effectively. Provision of a continuous development program promotes board and organizational performance as board members augment their knowledge, skills and abilities of their roles and responsibilities, and cultivate board, staff, and stakeholder relationships. The target population for this study was board members of non-profit organizations in Louisiana. A total of 267 non-profit organizations were contacted with five board members from each organization to complete the survey. Of a survey sample of 1,335, 110 board members responded to the survey for a final response rate of 8.2%. Eighty-four respondents provided usable data; therefore, twenty-six respondents who provided unusable data were dropped from the study. Follow-up of non-respondents was not possible because the researcher did not have board members' e-mail addresses. The Hollins Board Development Survey was a 52-item researcher-designed questionnaire, which consisted of a five-point anchored rating scale and multiple-choice items. Post hoc comparisons of board members' responses on the size of the non-profit board were performed using the Tukey HSD test, which revealed a significant amount of variance on non-profit board size at the  $p < .05$  level. Results suggested that larger boards of directors are more likely to have board development activities. A regression model with three independent variables, "Size of the non-profit board" - "5-9 members" and "10-14 members", and "Age of non-profit board member" explained a significant portion of the variance of selected demographic traits on the Hollins Board Development Survey score.

# **CHAPTER 1**

## **INTRODUCTION**

Non-profit entities are organizations that do not generate and distribute their profit to stakeholders, but use them to accomplish their organizational goals to benefit the public (Masaoka, 1999; Wallace, 2005). This contrasts with for-profit entities which, by design, generate revenue primarily for their stakeholders, and distribute profits to their owners (Wallace, 2005).

Many non-profit organizations qualify for and receive tax-exempt status (i.e., exemption from federal income tax) when they are organized for one or more of the purposes (charitable, educational, religious, scientific, literary, public safety testing, national or international amateur sports competition promotion, and children or animal cruelty prevention) designated under section 501(a) of the Internal Revenue Code (U. S. Department of Treasury, Internal Revenue Service, 2008).

Non-profit organizations encompass a range of services (Abilene Christian University, Non-profit Management Center, 2007; U. S. Department of Treasury, Internal Revenue Service, 2008). Some of the many kinds of non-profit organizations are as follows:

- Business and professional leagues
- Charitable, religious, and educational organizations
- Civic leagues and social welfare organizations
- Labor, agricultural, and horticultural organizations
- Public charities and private foundations
- Social and recreational clubs
- State-sponsored high-risk health coverage organizations
- Veterans' organizations

The United States (U.S.) Government requires non-profit organizations to have a board of directors, which provides oversight of the organization. A board of directors consists of individuals possessing an array of knowledge, skills, and expertise in diverse areas. The board members employ their knowledge and expertise in unity to advance the organizational mission and vision by achieving organizational goals. According to Joseph (1995) and Siebens (2002), organizations select board members based upon their business associates, experience, expertise, and leadership.

In recent years, expectations from companies and the people served by organizational boards have increased dramatically, especially in the aftermath of for-profit and non-profit company scandals over the past decade (Barrett, 2006; DuBrin, 2004; Sonnenfeld, 2002). Nobbie and Brudney (2003) further explain, “The involvement and participation of non-profit organizations in all facets of society has moved government, funders, researchers, and the public to set high standards for accountability and performance from these entities” (p. 571).

Along with the responsibility of organizational oversight, a board of directors must augment its levels of expertise in governance to remain effective in its role (Dittmar & Doorley, 2007). Because of the dynamic needs of persons within an organization, and the impact of national and international issues such as energy, environmental changes, the global economy, health, human rights, population shifts, and war, a board must remain abreast of trends. In addition, a board must consider federal, state, and municipal laws and statutes in its decision making. This is critical for non-profit organizations, for they are businesses 1) chartered by the State, 2) are often recipients of tax-exempt status, and 3) usually receive federal, state, and/or private funding (U. S. Department of Health and Human Services, Health Resources and Services Administration, Bureau of Primary Health Care, 2000; U. S. Department of Treasury, Internal Revenue Service, 2008).



## **Rationale**

Non-profit organizations are complex entities. They require multiple resources including human (i.e., board of directors, administration, staff, volunteers, and community partners), financial (i.e., grants, donations), and other (i.e., in-kind contributions, technical assistance) resources for support and sustainability. Anheier (2000, p.7) declares,

In terms of its environment (managing diverse constituencies, stakeholders and multiple revenue sources including donations, fees and charges, and public sector payments like subsidies, grants and contracts), and its internal components (board, staff, volunteers, clients and users), any non-profit organisation of, for example, 50 employees and 100 volunteers easily surpasses the complexity of managing an equivalent for-profit firm of equal size.

To effectively govern such complex organizations, a board of directors must have continuous board development to improve its performance, productivity, and outcomes (Brown, 2007). This leads to improved organizational performance and productivity for administration and staff, and contributes to organizational sustainability. Eadie (2006) provides three key elements for developing a board:

- 1) Developing board structure – This involves size of the board, procedure for board member appointments, and use of standing committees.
- 2) Developing board duties – This encompasses kinds of documents and products which the board should routinely review and make declarations; processes of decision making on these duties; and collaboration with the Chief Executive Officer (CEO) and senior managers on forming and making these products and documents, as well as dividing the labor related to their construction.

- 3) Developing board members – This includes managing board composition, determining new board member attributes, and fortifying board members' governing skills.

Weinstock (2008, p.20), in addressing board development adds,

The governing board and its CEO should review board development programs and improve them accordingly. A standing board committee should be assigned oversight of this and ensure that all trustees are 'very familiar with current and emerging benchmarks of good governance.

The critical function of board development is reaffirmed by Mason and Royce (2007), who declare the importance of having a board that is "fit for purpose" (p.1). They believe that the board should "have the ability to lead and manage in a complex environment, balancing economic reality with social and environmental values and mission" (Mason & Royce, 2007, p.1).

Board development provides numerous benefits, the first being the ability to attract, select, and retain excellent board members and the CEO (Selingo, 2006; U. S. Department of Health and Human Services, Health Resources and Services Administration, Bureau of Primary Health Care, 2000). Board development is a necessity for effective leadership and management. When board development is provided to a board and the CEO, it demonstrates that board members and the CEO are valued by the organization (U. S. Department of Health and Human Services, Health Resources and Services Administration, Bureau of Primary Health Care, 2000).

Second, board development aids in an appreciation of diverse backgrounds and perspectives throughout the organization. Board members should be appointed who have different interests and areas of expertise. Boards need to appoint individuals possessing more experience and representing a range of knowledge and interests (Ebling, 1985; Kelderman, 2008).

In assembling a non-profit board, it is important to include qualified individuals of diverse backgrounds, including gender, race, and so forth (Weinstock, 2008). For example, there has been a growing concern nationally about the need for more women on boards (Bilimoria, 2006; Daily & Dalton, 2003; Francoeur, Labelle, & Sinclair-Desgagne', 2008; Nguyen & Faff, 2006-2007; Terjesen & Singh, 2008). Frequently, boards do not reflect the makeup of the organization and the U.S. workforce, in which more than half of workers in management, professional, and related occupations in 2006 were women (U.S. Bureau of Labor Statistics, 2007). In 2005, most Fortune 500 companies had only one or two women directors (Catalyst, 2005). Similarly, in 2008 and 2009, only 15.2% of directors of Fortune 500 companies were women (Catalyst, 2009; Connor, 2010).

Third, the creation of effective work teams is another benefit of board development. Effective work teams are necessary to execute the goals of the board and the organization. The basis of effective boards is trust, according to Greenleaf (1977). He states that trustees (i.e., board members) should work to establish and build trust within their organization, thus living up to their name.

In creating an effective board, it is vital that the board and its members know and understand the following concepts (BNET Editorial, n.d.):

- Basic board structure
- Expansion of board responsibilities
- Importance of working with internal inspectors
- Management of possible conflicts of interest
- Number of directors a board needs
- Role of the board president
- Role of the board in the organization
- Roles and responsibilities of board committees

- Selection and appointment of suitable board members

A fourth advantage of board development is the formation of relevant policies in adherence to federal, state, and municipal laws and the organization's mission and vision. An integral role of a non-profit board is policy development (Carver, 2006; Elks, 2004; Manley, 2005). Policies should also reflect the mission, vision, and needs of the organization (Carver, 2006). Board trustees need education and training in creating sound policies based upon municipal, state, and federal laws for non-profit organizations. In addition, a successful policy maker, according to Elks (2004, p.1.), "should have an understanding of the association's past, a vision for the future, and knowledge of the present."

A fifth advantage of board development is improved board and organizational problem solving. It is essential that board members learn the sundry issues affecting the non-profit organization and strategies to constructively solve problems (Rindova, 1999). Rindova (1999, p.953) declares, "Directors possess valuable expertise, which they can apply to a variety of contexts." Also, board development sessions can serve as a forum to obtain input from fellow board members, the CEO, other senior managers, and human resource educators. McCauley and Van Velsor (2004, p. 452) explain, "Effective dialogue incorporates feedback from organization members about both the process and the results."

A sixth benefit of board development is an improved relationship between the board and the CEO. One of the most critical relationships within a non-profit organization, the relationship should be one of mutual respect, support, and trust (Greenleaf, 1977; U. S. Department of Health and Human Services, Health Resources and Services Administration, Bureau of Primary Health Care, 2000). This is essential in that appointing, appraising, and assisting the CEO are among the primary responsibilities of the governing board (Carver, 2006; Chait, Holland, & Taylor, 1991; Greenleaf, 1977; Iecovich, 2004; U. S. Department of Health and Human Services, Health Resources and Services Administration, Bureau of Primary Health Care, 2000). Additionally, a sound relationship enables the board and the CEO to collaborate on board

and organizational goals. In participating in board development, board members and the CEO learn and discuss together the functions and tasks of the board and CEO, their relationship to each other, and ways to facilitate their relationship (Eadie, 2005; Sonnenfeld, 2002).

As in learning to facilitate board-CEO relationship, the board can also learn to facilitate its relationship with organizational staff through participation in board development. Such participation leads to a seventh benefit, improved relationships between the board and staff (Boulton, 2003). Board development provides opportunities for board members to receive education on board and staff roles and responsibilities. It promotes the importance of the board leading the organization, and the staff executing organizational goals and objectives under the auspices and supervision of the CEO and senior managers (McNamara, 1997-2008). Lastly, board development helps board members to comprehend and appreciate the value of staff and its contributions to the organization, its stakeholders, and its success (McNamara, 1997-2008; U. S. Department of Health and Human Services, Health Resources and Services Administration, Bureau of Primary Health Care, 2000).

Eighth, board development leads to improved service to internal and external customers. Board development assists the board in knowing, understanding, and relating properly to its customers (Weinstock, 2008; U. S. Department of Health and Human Services, Health Resources and Services Administration, Bureau of Primary Health Care, 2000). This is particularly important as the board serves as an ambassador for the organization and a link between the public and the organization (U. S. Department of Health and Human Services, Health Resources and Services Administration, Bureau of Primary Health Care, 2000). Because the board serves as an ambassador, it can work with administrators and staff to foster customer relationships. Finally, board development reduces board and organizational liability (Alberta Board Development Program, 2009; Heineman, 2008). This is important in light of

increased corporate liability because of recent organizational scandals, leading to increased board accountability and responsibility.

Board development should ensure that board members understand their roles and responsibilities, board governance models, need for board and officer insurance, risk management, corporate finances, etc. Heineman (2008, p.2) adds,

The board should ensure that the risk function report directly to the board as a whole or to the audit committee...As experienced individuals, it is board members' duty to ask hard questions when things are going extremely well as well as when they are going badly.

### **Purpose**

In light of the importance of board development to effective functioning, the purpose of this study was to determine the perceptions of board members of selected non-profit organizations in Louisiana regarding board development. In addition, this study described board members on 1) selected demographic characteristics, and 2) relationships between perceptions and selected demographic characteristics.

### **Objectives**

In addressing the research problem, the following objectives directed the study:

1. Describe board members of selected non-profit organizations in Louisiana on the following selected demographic characteristics:
  - a) Gender
  - b) Race
  - c) Highest educational level
  - d) Age of board member
  - e) Primary occupational area

2. Describe board members of selected non-profit organizations in Louisiana on areas related to their board appointment experience:
  - a) Reasons for non-profit board appointment
  - b) Length of time as a non-profit board member
  - c) Number of non-profit board appointments
  - d) Roles served as a non-profit board member
  - e) Specific areas of board development offerings
  - f) Preferred learning delivery methods for board development activities
  - g) Areas of board development applied to employment or non-profit organization
  - h) Presence of board job description
  - i) Annual evaluation of board member performance
  - j) Appointment to a for-profit board
  - k) Length of for-profit board appointment
  - l) Opportunities related to board development
  - m) Size of the non-profit organization
  - n) Size of the non-profit board
3. Determine perceptions of board members of selected non-profit organizations in Louisiana on board development activities:
  - a) Board roles and responsibilities
  - b) Board evaluation
  - c) Corporate evaluation
  - d) Corporate operations
  - e) Corporate sustainability

- f) Ethics
  - g) Facilitation skills
  - h) Financial management
  - i) Fundraising
  - j) Grant writing
  - k) Laws affecting the non-profit organization
  - l) Leadership skills
  - m) Management skills
  - n) Orientation
  - o) Policy development
  - p) Public/community relations
  - q) Real estate management
  - r) Relationship with corporate staff
  - s) Short-term planning
  - t) Long-term planning
  - u) Technical management
4. Determine if a relationship exists between the size of the non-profit board and the presence of board development activities
  5. Determine if a model exists explaining a significant portion of the variance in the Hollins Board Development Survey scores of board members of selected non-profit organizations in Louisiana on selected demographic measures:
    - a) Gender
    - b) Race



- c) Highest educational level
- d) Age of board member
- e) Primary occupational area
- f) Length of time on the board
- g) Number of non-profit boards served on
- h) Reasons for appointment to non-profit board
- i) Roles served as a non-profit board member
- j) Size of the non-profit organization
- k) Size of the non-profit board

### **Significance**

This study was designed to augment the understanding of how board members of non-profit organizations in Louisiana perceive the importance of and need for board development. Carver (2006) maintains, “The board is responsible for its own development, its own job design, its own discipline, and its own job performance” (p. 189). The findings of this study should assist non-profit boards in creating and sustaining sound board development programs. Moreover, the findings should encourage non-profit entities to view and promote board development as an important means of improving organizational performance and advancing the corporation’s image as a progressive learning organization, thereby demonstrating non-profit entities’ commitment to their own success.

### **Limitations**

There were four limitations regarding this study. The first limitation was that the research was restricted to non-profit organizations in Louisiana with a minimum of six board members. A second limitation was that all non-profit organizations are not members of the state’s association of non-profit organizations, as it is not required. Hence, this study included board members of non-profit organizations

that were registered with the state association for non-profit organizations. A third limitation was that the researcher did not have the e-mail addresses of participants, and relied upon the CEOs and/or board chairs to send the survey and related communications to participants. This contributed to the final limitation, a low response rate. Of a survey sample of 1,335, 110 board members responded to the survey for a final response rate of 8.2%.

## **Definitions**

Pertinent terms and their definitions relative to the study are noted below:

- 1) Development – An array of multiple behaviors used to bring an individual or an organization to a higher level in performance or achievement of roles and responsibilities (researcher’s definition).
- 2) Governance – “Means in which the leading authority, often the board of directors...guides and monitors the values and goals of its organization through policy and procedures” (Philanthropic Foundations Canada, n.d.).
- 3) Kind of organization – The primary services provided by an organization to a consumer (researcher’s definition). Service categories include business/commerce/trade, civic leagues/social welfare, fraternal, labor/agricultural/horticultural, religious/scientific/charitable/educational, social clubs, veterans’ groups, and so forth.
- 4) Training – A process of planned learning activities used by an individual to acquire abilities for developing individual and organizational performance (researcher’s definition).

## **CHAPTER 2**

### **REVIEW OF LITERATURE**

In this study, the review of literature examined the priority of board development activities for non-profit boards of directors and the effects of development activities on organizational performance. In reviewing these topics, five primary areas were explored. They included 1) a historical perspective of the establishment and evolution of non-profit boards in the United States; 2) board governing models; 3) the roles and responsibilities of boards of directors and the importance of corporate governance; 4) the importance of board development; and 5) board development areas.

#### **Historical Perspective of Non-Profit Boards in the United States**

Over the years, boards of directors and their roles and responsibilities have evolved, in the light of economic, governmental, and legal affairs affecting them and the non-profit organizations they serve (Hall, 2003).

The earliest American board, the Massachusetts Bay Company charter, was created in 1628. It was granted the right to property and the right to govern (Hall, 2003; Moody, 1947-1950). The Massachusetts Bay Company selected 13 men who were chosen for their expertise, honesty, and wisdom, to oversee the colonial government. In addition, this company had three parts -- the governor and deputy governor (i.e., executive section) and the assistants and the general court (i.e., the two legislative sections). Eventually, this prototype was adopted by other entities within the colony, such as churches and townships, giving rise to governing boards.

Lay governance began in Massachusetts at its first college, Harvard College, in 1636 (Hall, 2003; Harvard College, 1930; Kezar, 2006). The college was established because of a need to train future leaders. The governing entity of Harvard included 12 overseers, consisting of six magistrates and six ministers. Its president, Henry Dunster, obtained incorporation of Harvard, to frame it as a corporate

entity distinct from the state. This status secured Harvard's control of its properties and provided greater autonomy in managing its own affairs (Hall, 2003; Harvard College, 1930).

In 1701, a group of leading Connecticut ministers founded Yale University (Hall, 2003; Yale University, 2009). Yale had a single self-perpetuating board made up of non-resident members of the clergy. This contrasted with Harvard University's dual board, a self-perpetuating body which ordered the affairs of the constitution, and an ex-officio group which provided accountability to church and state (Hall, 2003).

In the early American republic, American law shaped the treatment of organizations, with power to dissolve or alter them (Hall, 2003). However, there were no procedural guidelines in doing so. This power of state legislatures to dissolve or alter the organizations at will was very crucial, since all Americans at that time considered charitable, educational, and religious organizations as public enterprises. Massachusetts was a bellwether in chartering organizations and establishing trusts.

In 1769, Dartmouth College was founded by the Reverend Eleazer Wheelock, a Congregational minister from Connecticut (Dartmouth College, 2009; Hall, 2003). Nevertheless, in 1815, the New Hampshire legislature declared the college's charter invalid, changed its name to Dartmouth University, and gave it a new governing body. The original board of directors challenged these legislative acts before Chief Justice John Marshall.

In his ruling, Chief Justice Marshall determined that "if charitable gifts and charitable institutions were subject to the perpetual threat of legislative interference, no sensible person would be willing to make donations for charitable, educational, or religious purposes" (Hall, 2003, p.12). This decision on behalf of Dartmouth College was likely the most important ruling by a U. S. court, for it shielded organizations from legislative interference, and furthered the idea that the public's will could be expressed

in other ways than electoral and governmental ways. Thus, it endorsed the idea of private associational initiative on behalf of the public, which significantly contributed to the existence of the non-profit sector.

In 1830, the creation of the Prudent Man Rule occurred, which has been the fiduciary standard to which trustees (directors) have been held in the past and present (Hall, 2003).

Under the Prudent Man Rule, when the governing trust instrument or state law is silent concerning the types of investments permitted, the fiduciary is required to invest trust assets as a "prudent man" would invest his own property, keeping in mind the needs of the beneficiaries, the need to preserve the estate (or corpus of the trust), and the amount and regularity of income. The application of these general principles depends on the type of account administered (Federal Deposit Insurance Corporation, 2005, Prudent Investments, ¶ 10).

As the non-profit sector grew, so did the study of its operations. Leonard Bacon, Yale professor and abolitionist devised the first major study of non-profit management and governance (Hall, 2003; Quist, 2000). Bacon believed that a true working board of directors consisted of members who maintained a sense of personal accountability for organizational activities. In addition, the board addressed issues of organizational legitimacy and authority in a democracy.

By the turn of the century, businessmen controlled the boards of most colleges and universities, instead of educators (Hall, 2003). Through the establishment of grantmaking foundations, businessmen had created powerful instruments for shaping the priorities and policies of an array of cultural institutions. Between 1860 and 1900, the following professionals were noted most on boards of higher education (Hall, 2003):

- Percentage of businessmen increased from 23 to 26 percent
- Percentage of bankers increased from 5 to 13 percent

- Percentage of attorneys increased from 21 to 26 percent
- Percentage of educators increased from 5 to 8 percent

Representing this new style of leadership was President Herbert Hoover, a wealthy mining engineer with a passion for public service (Hall, 2003; Hoover, 1952). Hall (2003, p.19) writes,

Acknowledging the “great inequalities and injustices” caused by modern industry, Hoover sought to frame a new conception of “progressive individualism” that would reconcile traditional democratic and Christian values with the realities of capitalism.

In this system, organizations promoting economic cooperation worked closely with other kinds of voluntary organizations to combine self-interested pursuits with the higher values of cooperation and public service. Hoover’s efforts not only helped to familiarize the mass of Americans with board governance, but democratized and disseminated its use as a mechanism for public and private decision making (Hall, 2003; Hoover, 1952).

Perhaps the most compelling evidence for the impact of New Era social philosophy on governance is the emergence of focused efforts to educate trustees and to improve board performance, starting in the mid-1920’s (Hall, 2003). These efforts raised a host of concerns about directors’ responsibilities to the public and to stockholders, focusing on such issues as accountability, conflict of interest, fiduciary prudence, and the duty of loyalty.

In 1927, the first board training institute met in New Haven, Connecticut and attracted 200 participants from 12 states (Hall, 2003). The training institute included topics such as board-staff relations, board members’ responsibilities and function, relationships between social agencies, and board members’ education. Similarly, further board concerns in areas such as collaborative activities, committee structure, fiscal management, staff and volunteer management were addressed in *The Board Member*, a publication founded by Annie Winslow in 1936 (Hall, 2003).

After 1940, concerns about governance and formal efforts to educate boards broadened to include boards of education, independent schools, public and private colleges and universities, hospitals, and grantmaking foundations (Hall, 2003). The debate over the role and responsibilities of the boards of business organizations was also rekindled. In the years after World War II, the stewardship dimension of governance was gradually displaced by the perspectives and methods of managerial professionalism.

The years after President John F. Kennedy's election showed a rise in the number of secular, charitable, tax-exempt organizations. The number of tax-exempt recipient organizations registered in the U. S. with the Internal Revenue Service (IRS) was 50,000 in 1950; more than a quarter million by the mid-1960s; and greater than one million by the mid-1980s (Hall, 2003). Accompanying this rise was increasing regulatory scrutiny. Thus, the U.S. Congress began to tighten federal surveillance of foundations and charitable, tax-exempt recipient organizations in the 1950s and 1960s, respectively (Hall, 2003).

Among the most powerful forces transforming board governance in American non-profit organizations was the Model Non-stock Corporation Statute, drafted by the American Bar Association in 1964 and revised in 1987 (Hall, 2000; Hall, 2003). It permitted the establishment of non-profit organizations for any legal purpose, and released non-profit organizations to engage in business activities as long as these ultimately served charitable objectives. The 1987 revised statute further defined the nature of non-profit organizations by establishing three non-profit categories: public benefit, mutual benefit, and religious organizations. Additionally, the statute shifted criteria of prudence from a strict trust standard to a more flexible corporate director standard.

These trends caused organizations that were historically dominated by Protestant elites to include men and women with no previous board experience and different ideas about community and corporate leadership to their boards (Hall, 2003). Increasing dependence on government funding in certain non-

profit industries including human services created a demand for board members who could span the boundaries between entrepreneurial organizations and influential constituencies such as government agencies, foundations, corporations, and client groups. In addition, the privatization of care for disabled persons led to contracts with non-profit service providers, some of whom brandished political influence and acquired great wealth (Hall, 2003; Museum of disABILITY, 2008).

In the 1980's, non-profit board governance in the United States was marked by the following events (Barbanel, 1990; Barrett, 2006; Board Source, 2009; Hall, 2003):

- Number (increasing) of board governance publications
- Spate of public disputes between boards and CEOs
- Succession of prominent scandals related to the complex nature of non-profit governance and the role of non-profit boards (e.g., Covenant House, televangelists, United Way)
- Creation of the National Center for Non-profit Boards to handle the call for governance information

Despite the numerous efforts to bring order and accountability to its exploding domain, the non-profit sector has failed to comprehend the forces changing its world. Sagacious researchers such as Henry Hansmann, Burton Weisbrod, and Ralph Kramer were disregarded or criticized when they proclaimed the emergence of major changes in the sector related to corporate law reforms and the privatization of human services provision (Hall, 2003; Hansmann & Kraakman, 2000; Kapur & Weisbrod, 1999; Kramer, 1998). However, in recent decades, it is essential that governing boards understand and embrace the need for stewardship. This need for stewardship among trustees (i.e., board members) is most clearly expressed by Robert Greenleaf, a former CEO and a trustee (Hall, 2003; Greenleaf, 1977). Greenleaf believed that trustees are servants to those they serve -- the public, the organization, and other stakeholders, and possess power to creatively respond to and transform forces and trends in society.



## **Board Governing Models**

As board members manage their roles and responsibilities, it is important to consider the governance model that is most suitable for the particular non-profit organization. According to the United Way of Canada (n. d., p. 1),

Boards must make decisions about their structure based on three basic questions:

- 1) Which decisions does the board want to make and which does it want to delegate?
- 2) How much involvement does the board want to have in the operations of the organization?
- 3) How will the reporting relationship between the board and the staff be defined and communicated?

Though there are a number of models (Bradshaw, 2007; Renz, 2004), non-profit boards tend to follow one of five models, which differ in focus of board roles and responsibilities, and relationship between board and staff (Garber, 1997). These are influenced by the history, purpose, and size of the organization. In summary, the five models – Advisory Board, Cooperative, Management Team, Patron, and Policy Board – and their characteristics, including strengths and weaknesses, are as follows (Garber, 1997):

- **Advisory Board Model** – This model focuses on the helping and supportive role of the board. This occurs when the CEO is the organization's founder. Board members are appointed because they 1) are trusted as advisors by the CEO; 2) have a professional skill that the organization needs but does not want to pay for; and 3) have the capacity to aid in establishing the credibility of corporation for fundraising and public relations purposes. The Advisory Board model can work well for a short time, but it exposes the board members to significant

liability in that it fails to provide the accountability mechanisms that are required of boards of directors.

- **Cooperative Model** - In this model, all responsibility is shared; thus, there is no CEO. Also, called “peer management” or “collective management”, this highly democratic model requires a shared sense of purpose, an ability to compromise, and a willingness to accept personal responsibility for others’ work. However, it is difficult to ensure personal accountability.
- **Management Team Model** – This most frequently used approach involves boards which operate across functional lines, using committees to handle board responsibilities. Such boards are highly involved in the operational and administrative activities of the corporation. Board members are selected based upon their knowledge and expertise in an area, or because they are members of a stakeholder group. This model is not well-suited for organizations with professional management and full-time employees. Also, there is a tendency for board members to refuse to delegate authority.
- **Patron Model** – This model, which has some similarity to the Advisory Board Model, has even less influence over the organization. This board consists of influential and wealthy persons committed to the mission of the organization, who work diligently in fundraising. Patron Board members cannot be relied upon for governance tasks (e.g., organizational planning, program monitoring).
- **Policy Board Model** – In this final approach, the Policy Board Model shares the view that the job of the board is to establish the guiding principles and policies for the organization; to delegate responsibility and authority to those who are responsible for enacting the principles and policies; to monitor compliance with those guiding principles and policies; and to ensure that staff and board are held accountable for their performance. However, it differs in the way

these jobs are done and the extent to which strategic planning and fundraising are seen as board jobs. This type of board possesses a high level of confidence in the CEO, has few standing committees, and has more full board meetings. Board development is given a high priority to ensure that new members are able to function effectively, and recruitment is a continuous process. Members are recruited for their demonstrated commitment to the values and mission of the organization.

### **Roles and Responsibilities of Non-profit Boards of Directors**

In fulfilling its commitment to the non-profit organization and its stakeholders, the purposes of a board of directors are to 1) manage the organization, 2) connect the organization and the community, and 3) guarantee adherence with federal, state, and municipal laws (U. S. Department of Health and Human Services, Health Resources and Services Administration, Bureau of Primary Health Care, 2000).

The board of directors or trustees plays an essential position in the success of the non-profit organization. Every board is expected to discharge three primary roles, which include mission and strategy setting, performance evaluation and oversight, and public relations (Carver, 1990; Chait et al., 1991). The board performs its responsibilities in collaboration with chief administrative staff and others to achieve board and organizational goals. The roles and responsibilities of non-profit boards are as follows (Axelrod, 1994; Carver, 1990; Drucker, 1992; Duca, 1996; Houle, 1989; Iecovich, 2004; Masaoka, 1999; Soltz, 1997; U. S. Department of Health and Human Services, Health Resources and Services Administration, Bureau of Primary Health Care, 2000; Waters, 2007):

- Fiscal matters and fundraising
- Maintenance of relationships with the task environment
- Management of senior human resources
- Monitoring and appraisal of programs and services

- Overall mission of the organization
- Policy development and setting
- Self-assessment of board's performance and effectiveness
- Strategic planning

First, fiscal matters and fundraising are one of the most critical areas of board management.

Inherent in this area is approval of the corporation's annual budget, audits, fiscal oversight, fundraising, investments, etc. (Iecovich, 2004). In their studies of New York school board practices, Manley (2005) found that board trustees with the highest professional leadership practices participated in activities such as budget development, capital projects, cost benefit analysis, resource allocations (with input from the community), and investments. He adds, "Aware of their fiduciary responsibilities, they [the board] review revenues and expenditures monthly and conduct forecasting analysis for all compensation packages, benefit plans, and contracts so they will not be surprised by future costs" (Manley, 2005, p. 65).

Second, maintenance of relationships with the task environment involves external relationships with organizations, communities, and the public, which is necessary to execute the other board roles and responsibilities. A successful board talks regularly with the community, and considers the values of the community (Manley, 2005).

Third, management of senior human resources includes the selecting and hiring of the CEO, collaborating with the CEO and other senior staff members, and evaluating CEO performance. This is confirmed by Greenleaf (1997, p. 131), who states that one of the four main functions of a board is to "appoint the top executive officers and design the top administrative structure."

Fourth, observation and appraisal of programs and services includes evaluation of outcomes of organizational goals to improve quality of products and services to customers. Greenleaf (1997, p. 131)

remarks that the board in performing two of its core functions should “assess the total performance of the institution, and take appropriate action based upon what has been found in that assessment.”

Fifth, the overall mission of the organization involves establishing the mission and vision of the organization, and ensuring that the mission accomplishes its outcomes and the organization achieves its goals. Chait, Ryan, and Taylor (2005) encourage collaboration with top executives to create a mission and a vision. Similarly, in his work with schools, Manley (2005, p. 64) adds, “Effective boards have respectful communication with the superintendent...these boards exhibit professional leadership by keeping their focus on the mission and goals.”

Sixth, policy development and setting involves creating guidelines and tenets based upon the organization’s mission. Carver (2006, p. 72) declares, “Policy development is not an occasional board chore, but its chief occupation.” He further demonstrates the importance of policy development in his Policy Circle, which includes governance process, board – CEO linkage, staff means, and ends issues.

Next, it is important that the board conducts an annual self-assessment of its performance and effectiveness within the organization, and makes sure it is following ethical and legal guidelines. The context of this role and responsibility is further explained by Lakey (2003, p. 1): “Because of some very high profile situations, the public has become very skeptical in general. A self-assessment process indicates board members take their responsibilities very seriously.” Moreover, a well-done self-assessment leads to improved organizational performance (Board Source, 2009; Carver, 2006; Kelly, 2003). This fact is substantiated by McDonagh (2006), in her study on hospital governing boards. She found that higher performing boards had better hospital performance in several dimensions, particularly in profitability and lower expenses.

Finally, strategic planning involves defining the direction in which the organization is to go through goals and objectives, and deciding the allocation of human and other resources to pursue this

direction. Greenleaf (1977, p. 126), in his seminal work, *Servant Leadership: A Journey into the Nature of Legitimate Power & Greatness* declares

The first thing an institution needs to do in order to start on a conspicuously higher course is to state clearly where it wants to go, whom it wants to serve, and how it expects those served directly, as well as society at large to benefit from the service.

### **The Importance of Board Development**

Recent literature reveals a lack of information on present knowledge levels of board directors. Wilson and Claypool (1994), in their study on hospital governing boards, state, "...little is written about the existing knowledge of board members" (p. 28). Urice (1990, p. 53) reported similar findings in his survey of American arts boards. He states,

Researchers lack information on board members' basic demographics, as well as their attitudes, experiences as board members, and their behavior with regard to their organizations. In sum, few supported statements can be made regarding the current condition of boards of directors...

Sofaer, Lammers, and Pourat (1991) provide two reasons for the paucity of empirical research on the relationship between board governance and organizational performance. First, they offer that the relationship between sound governance and hospital performance is complex and non-linear. Thus, in research, it would be necessary to address this multifaceted, unpredictable relationship. Second, Sofaer et al (1991) offer that the role of the CEO complicates this relationship, as the CEO serves as both the administrative and governance leader.

Alexander, Earle, Longo, and Pahl (1990) in their survey of 3,166 non-federal short-term hospitals, examined five areas of hospital governance: Governing board composition and organization, corporate relationships, board-CEO relations, medical staff-governing board relationships, and governing

board operations. Foremost, their study showed that the primary gauge of governing board operations was the amount of time spent on issues engaging most of the board's time over the past year. The most frequently selected issues were "Hospital assets/financial availability" (N=1,299, 45.0%) and "Strategic planning" (N=408, 14.0%), with the least frequently selected issues being "Patient admissions" (N=6, 0.0%) and "Fundraising" (N=14, 0.0%). Alexander et al (1990) show these results in rank order (Table 1).

Table 1  
Topic on which Board Spent Most Time in Last 12 Months<sup>b</sup>

Topics	n <sup>a</sup>	%
Hospital assets/financial viability	1,299	45
Strategic planning	408	14
Major capital projects	353	12
Professional standards/quality assurance	289	10
Diversification, merger, joint ventures	168	6
Appointment/delineation of medical staff privileges	147	5
Hospital competitive position	93	3
Other	77	3
CEO performance	44	2
Litigation/hospital viability	22	1
Fundraising	14	0
Patient admissions	6	0

<sup>a</sup>N= 2,920

<sup>b</sup>Source: The American Hospital Association Data Center, Chicago.

Additionally, Alexander et al (1990) found that 1) hospital board membership requires persons combining their expertise and backgrounds; 2) corporate restructuring can possibly change the hospital

board's authority, accountability, and responsibility; 3) hospital boards focus most on the hospitals' economic performance, medical staff relations, and quality of care in evaluating CEOs; and 4) medical staff needs involvement in board decisions for improving communication and comprehension. Finally, Alexander et al (1990) discovered board members need education on their responsibilities to effectively meet hospital governance challenges. They also recommended a focused review of pertinent health care issues.

In another study, Radbourne (1993) found that the boards of 13 non-profit arts organizations needed much training in advocacy and visionary strategies to remain viable in the competitive environment. She also noted that board members stated that they would attend classes in board management of arts organizations, and would like to receive training in eight areas: Board chair and meeting procedures, financial management, funding and funding submission, fundraising, government arts policy, marketing, promotion, and strategic planning. Inglis and Cleave (2006), in their research on identifying the motivations of board members in non-profit organizations, found the need for continued emphasis on increasing leadership capacities and effectiveness of board members through appropriate human resource strategies.

Likewise, the Louisiana Cooperative Extension Service (1986) in its study of Extension committees noted several weaknesses in committee performance, including improper member orientation, inadequate member participation, and substantive procedural and technical insufficiencies. Barnett, Johnson, and Verma (1999, p. 3) in their study on Cooperative Extension advisory committees remarked, "Many [advisory committee] members did not have a clear understanding of the intended purposes of advisory committees. The majority felt the committee's main purpose was to identify problems and give the agent direction for Extension programs." Moreover, advisory committee members did not consider their committee work as an educational experience. These findings are corroborated by Tassin (2005) in



his study of the effectiveness of the 4-H advisory committee process. From the views of 4-H professionals and advisory committee members, Tassin discovered that most parish (county) 4-H advisory members were not properly equipped to contribute in the advisory process.

Because of increasing board liability, the demands that non-profit organizations encounter, global issues affecting organizations, and the lack of research on knowledge levels of board members and the effectiveness of board development, it is vital for non-profit boards to possess a core of knowledge for successful oversight of an organization. Furthermore, boards need members possessing more experience and representing a range of knowledge and interests (Kelderman, 2008). These factors further magnify the need for scholarly research on board development.

Next, experienced and inexperienced board members possess the need to learn about board responsibilities, regardless of length of time of board service. Joseph (1995, p. 1) asserts,

Even intelligent directors with the best of intentions can be overwhelmed by the level of detailed knowledge and expertise expected of today's boards. Regulatory issues, investor relations and legislation affecting corporate governance have become so complex and subject to interpretation that even experienced directors cannot hope to keep pace.

The provision of a board development program for directors to understand their roles and responsibilities is one feature of a sound board (Barnes, Haynes, & Woods, 2004; Barnes, Woods, Frye, & Ralstin, 2006; Gautam, 2005). Hammatt, McCrory, and Mullen (n. d.) declare that the initial action toward developing a successful advisory committee is to clearly define the roles and expectations of the membership.

Moreover, the ultimate responsibility for board well-being is the board itself. "The board is responsible for its own development, its own job design, its own discipline, and its own job performance", asserts Carver (2006, p. 189). This responsibility is echoed by His Horse is Thunder, in response to the

American Indian tribal colleges' and universities' requests for technical assistance with board training (Ambler, 2004, p. 1). She remarks, "While the seminar provided an excellent foundation for the basics in board responsibilities, it cannot take the place of board training for each tribal college board."

Since a board of directors or trustees is responsible for its own development, what must board members do to enhance their performance? Recommendations for improved performance are listed below (Elks, 2004; U. S. Department of Agriculture, Rural Business Cooperative Service, 2000):

- Increase knowledge of state and local laws that govern non-profit organizations
- Recognize and use the organization's governing documents (e.g., bylaws, policies)
- Prepare for attending board meetings (e.g., reading committee reports before the meeting)
- Recognize and use the CEO's experience to improve board decisions
- Preserve professional behavior before, during, and after board meetings
- Participate in formal (e.g., classes, seminars) and informal training (e.g., tutoring, reading materials) on operating non-profit organizations
- Conduct regular board self-assessments (including assessments of the board and each board member)

In designing a board development program, human resource educators must consider adult learning principles. Prior consideration of knowledge and experience in a particular area is imperative in designing a program for adult learners. Furthermore, human resource educators must assist adult learners in connecting current experience with past knowledge and experience (Knowles, Holton, & Swanson, 2005; Merriam & Caffarella, 1999). Miller (2000, p. 71) reflects, "Learners' life experiences outside as well as inside formal educational institutions are increasingly seen as important dimensions of learning."

Learning from life experiences is useful in designing programs for adult learners (i.e., board trustees), who have a frame of reference from which to build. A useful model for understanding the

learning cycle of board members is Kolb and Fry's (1975) Experiential Learning Model, as displayed in Figure 1

This renowned model consists of a continuous learning cycle of four points; learning can occur at any point. According to Kolb and Fry (1975, p. 1),

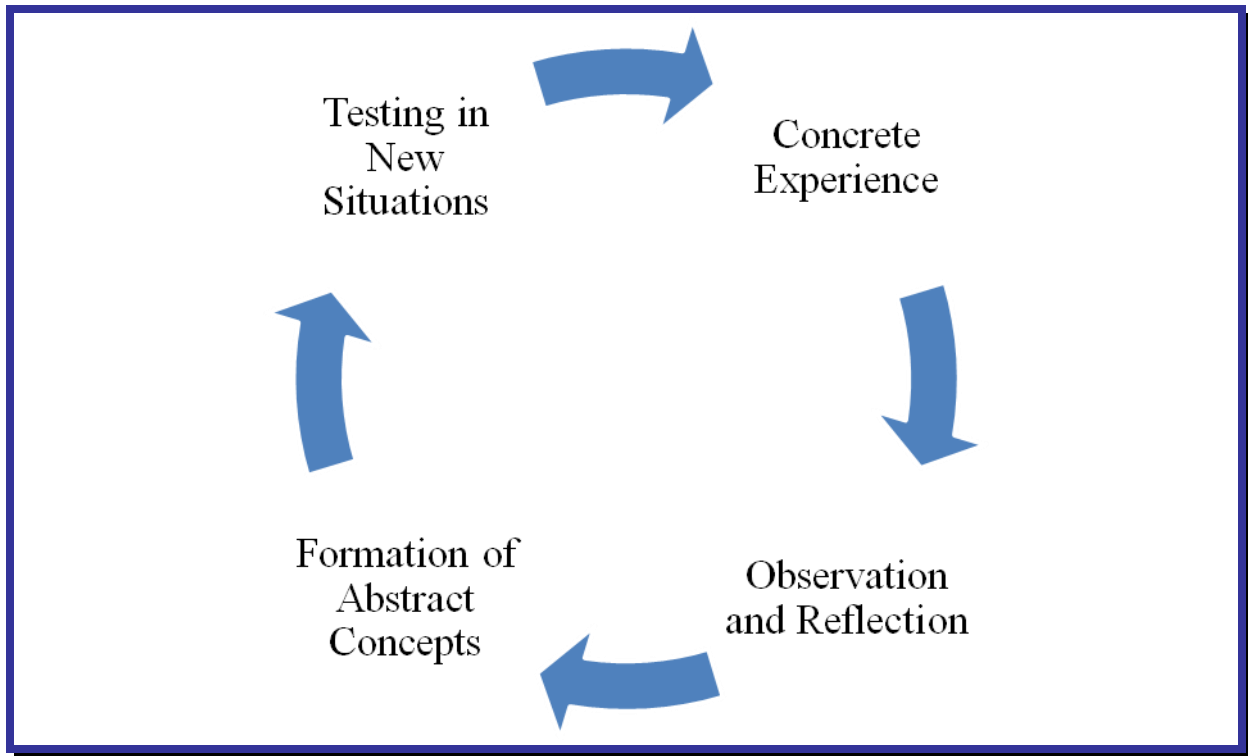


Figure 1. Kolb and Fry's (1975) Experiential Learning Model

The learning process usually begins with a person carrying out a particular action and then seeing the effect of the action in this situation. Following this, the second step is to understand these effects in the particular instance, so that if the same action was taken in the same circumstances, it would be possible to anticipate what would follow from the action...the third step would be understanding the general principle under which the particular instance falls...the last step... is its application through action in a new circumstance within the range of generalization.

Knowles et al. (2005) “Andragogy in Practice Model” addresses the conceptual framework of adult learning practice across several domains:

- Andragogy (core learning principles)
- Individual and situational differences (individual learner, situational, subject matter)
- Learning goals and purposes (individual, institutional, societal)

Each domain is applicable to the creation of a board development program, with the ultimate goal of augmenting organizational performance. In addition to improving organizational performance, another primary benefit is improving board performance by increasing the knowledge, skills, and attitudes of directors. In the andragogical learner analysis (Knowles et al., 2005, pp. 159-160), six principles are applied to the non-profit board in the following manner, with the applicable goals and purposes, and individual and situational differences:

1. “Adults need to know why they need to learn something before learning it.”

This principle is crucial for the board, for it may not realize the benefit of board development to itself, the organization, and society. The board must work toward understanding this.

2. “The self-concept of adults is heavily dependent upon a move toward self-direction.”

Some board members may have engaged in self-directed learning on corporate board management issues, while others may not have.

3. “Prior experiences of the learner provide a rich resource for learning.”

Prior experience may be a barrier because the new program is different and/or directors have never engaged in a board development program.

4. “Adults typically become ready to learn when they experience a need to cope with a life situation or perform a task.”

It is important that board members are able to assess their own needs for development – individually and collectively. Also, it is equally important that they understand the needs of their stakeholders, so they can be more effective in overseeing the corporation.

5. “Adults’ orientation to learning is life-centered; education is a process of developing increased competency levels to achieve their full potential.”

The new material covered in the board development program may be unfamiliar and complex. Board members may require additional training for especially complex material.

6. “The motivation for adult learners is internal rather than external.”

Most directors choose to participate in development activities to improve their own performance as a member and as part of the board. In addition, non-profit board members do not receive compensation for their services.

### **Board Development Areas**

In building a board development program, it is vital that development areas be clearly outlined, based upon board and organizational goals, consideration of best practices (e.g., in board development, board governance, non-profit sector, etc.), empirical literature review, mission and vision of the organization, and the board’s needs assessment results or board development analysis. The United Way of Canada (n. d., p. 1) denotes the components of the Board Development Cycle (Figure 2)

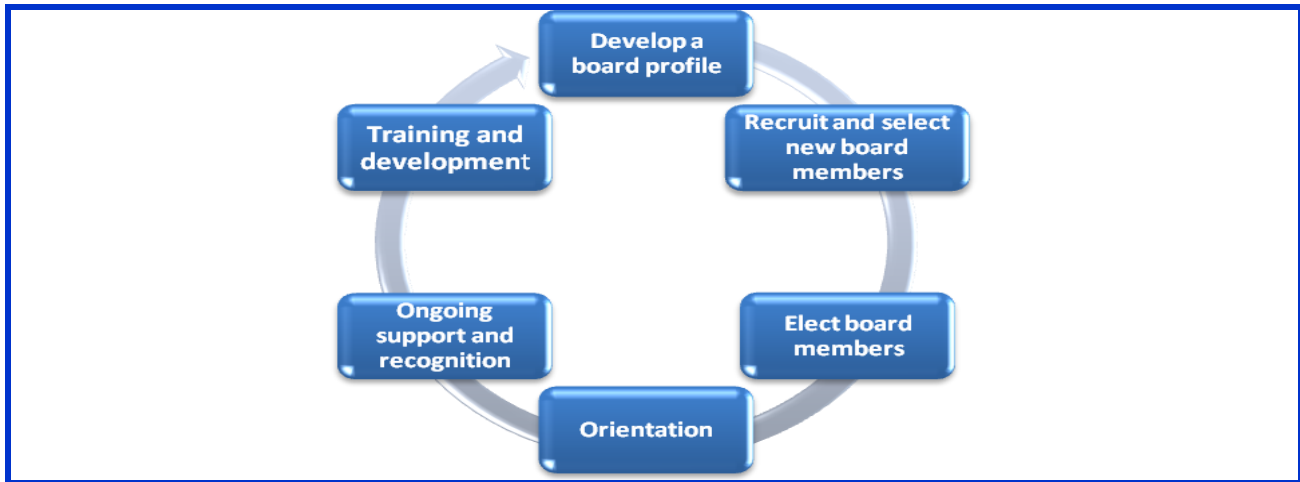


Figure 2. The Board Development Cycle  
Source: The United Way of Canada (n. d.).

### **The Organization Provides Board Development Activities for Its Board Members**

The organization, in collaboration with the board, is responsible for providing board development for board members (Carver, 2006). This is needed to equip board members for effective board governance. In addition, the organization is responsible for providing workforce development for employees and volunteers (Gray & Herr, 1998). Fewer smaller organizations provide structured training activities for their employees than medium and large organizations, though smaller organizations prefer on-the-job training. This is related to high cost, lack of information, lack of time, and staffing patterns (Baldwin & Johnson, 1995; Betcherman, Leckie, & McMullen, 1998; Leckie, Leonard, Turcotte, & Wallace, 2001; Rabemananjara & Parsley, 2006). Regardless of the organization's size, workforce development is essential to the organization, its employees and volunteers.

Second, the provision of a workforce development program leads to increased individual and organizational performance. Workforce development (i.e., board development) is necessary to aid the board in successfully leading a non-profit organization in a global economy. It also aids the board in addressing the complex nature of non-profit organizations.

Finally, in providing board development, the organization promotes its image as a learning organization -- one devoted to the development of people (Smith, 2001). The concept of learning organizations is further explained by Senge (1990, p. 3):

...organizations where people continually expand their capacity to create the results they truly desire, where new and expansive patterns of thinking are nurtured, where collective aspiration is set free, and where people are continually learning to see the whole together.

### **The Organization Provides New Board Members with an Orientation**

In providing board development as a part of workforce development, it is important to orient new board members to the organization, including its mission, vision, and history, culture, departments and services, policies, roles and responsibilities, and so forth. Orientation is “a process through which a new employee is integrated into an organization, learning about its corporate culture, policies and procedures, and the specific practicalities of his or her job” (BNET Business Dictionary, 2009). The provision of orientation 1) fosters relationships between new board members, the board, and the organization; 2) promotes confidence within the board member to actively participate in his own orientation; and 3) protects the board, board member, and organization against corporate liability (Joseph, 1995).

### **The Board Conducts A Needs Assessment to Determine Development Needs of Its Members**

In order to provide a relevant board development program, the board and CEO must conduct a needs assessment of its directors. This is necessary for the following reasons (Fitzpatrick, Sanders, & Worthen, 2004):

- Is used to establish goals, objectives, and strategies for board development
- Functions as an evaluation instrument toward individual, board, and corporate performance
- Provides continuous documentation of board development needs

- Provides documentation and direction of effective use of human and other resources in board development
- Serves as a tool for future planning of board development
- Serves as a tool of accountability to board, corporation, and its stakeholders
- Serves as a tool to determine discrepancies in directors' skills and the skills required for effective performance

Conducting a needs assessment involves (Brown, 2002; Fitzpatrick et al., 2004) collecting data to identify needs; verifying what needs can be met by development; and offering solutions. A primary decision is whether to use an existing program or design a new development program.

### **The Board Member Participates in Board Development Activities**

Next, a valuable component of adult learning is the active participation of each board member in his own learning (Knowles et al., 2005; Merriam & Caffarella, 1999). The individual's participation in board development demonstrates the individual's commitment to his own development, as well as the development of the board and organization (Gray & Herr, 1998). It also displays the board member's commitment to the board, organization, and its stakeholders. Moreover, the board member, as a person of influence, can use his influence to persuade other board members to pursue board development.

The importance of board member participation in board development activities is substantiated by Molinari, Morlock, Alexander and Lyles (1992) in their study of California hospitals. They found that board members who participate in board education and training provided by their organizations improved their decision making and proficiency in hospital governance. Correspondingly, this led to increased organizational occupancy, liquidity, and profitability, based upon several financial ratios and outcomes.



### **Fellow Board Members Participate in Board Development Activities**

Similarly, it is important that board members participate in board development, to show them commitment to the organization, stakeholders, et al. Furthermore, their participation shows the board's commitment to its own development (Carver, 2006). Additionally, board members show their leadership in the organization and demonstrate their belief in workforce development.

### **The Organization Considers Board Development a Priority**

It is important that the non-profit organization appreciate the significance of board development in providing support to the board, and showing its commitment to the board, stakeholders, and itself. The organization shows that it is a priority by offering a board development program, providing human and other resources, and collaborating with the board through the CEO about issues, factors (internal and external), etc., affecting the organization (Gray & Herr, 1998; Greenleaf, 1977).

### **The Board Considers Board Development a Priority**

Likewise, the board, which leads the organization, should view board development as a priority. This view is beautifully expressed by Maxwell (2005, pp. 304-305):

When people in an organization see the top leader growing, it changes the culture of the organization. It immediately removes many barriers between the top leader and the rest of the people, putting you on the same level with them, which makes the top leader much more human and accessible. It also sends a clear message to everyone: make growth a priority.

Board development is an integral part of board life. Time for board development strategies (e.g., role play, case study) based upon adult learning principles should be routinely allotted during board meetings (Ota, DiCarlo, Burts, Laird, & Gioe, 2006). Additionally, time should be provided throughout the year for board retreats, conferences, etc.

### **The Board Member Considers Board Development a Priority**

In addition to the board, the board member should examine his motivation for serving as a trustee.

Inglis and Cleave (2006, p. 83), in their study to develop a framework for identifying the motivation of board directors in non-profit organizations, found that the framework consists of the following components:

- Developing individual relationships
- Enhancement of self-worth
- Helping the community
- Learning through community
- Self-healing
- Unique contributions to the board

Thus, self-examination should include reflection, view of board development, willingness to participate in board development, etc.

### **The Board Provides Regular Board Development Activities**

The board is responsible for its own development (Carver, 2006). It should collaborate with the CEO in scheduling regular board development activities. These activities may be conducted in different forms, such as case studies, discussion, educational games, lectures, and role play (Ota et al., 2006).

### **The Organization Provides Human and Fiscal Resources for Board Development**

The organization, in its commitment to board development, should supply human and fiscal resources based upon sound planning (Gray & Herr, 1998; Knowles et al., 2005; Merriam & Caffarella, 1999). Examples of human resources include human resource educators; board members who are highly experienced and/or with long-term expertise in board development; and outside speakers in board

development. Fiscal resources for board development may come in forms of monetary donations and grants for equipment, meeting space, supplies, trainers'/speakers' fees, etc. (Knowles et al., 2005).

### **The Board Provides Development in General Board Roles and Responsibilities**

It is important that the board receives development in areas of basic board roles and duties. Every board is expected to discharge three primary roles, which include mission and strategy setting, performance evaluation and oversight, and public relations (Carver, 1990; Chait et al., 1991). Wilbur (2000, p. 29) states, "...an individual accepting a position on a governing board has fiduciary, moral, and ethical responsibilities." Basic board responsibilities (Carver, 2006; Smith et al., 2000) include the following:

- Advocating for the organization
- Appreciating other board directors
- Developing policy
- Ensuring financial soundness
- Giving toward the financial support of the organization
- Identifying potential new board members
- Making sure mission is achieved
- Providing job descriptions for board members
- Remaining ethical and professional
- Supporting and thanking staff

### **The Board Provides Development in Board and Corporate Evaluations**

An essential duty of the board of directors is to provide board and organizational evaluations in collaboration with the CEO and senior management. The evaluations should be on-going, including

formative (i.e., supplying data for program improvement) and summative (i.e., supplying data for decision making and/or appraising programs for adoption, continuance, or extension) (Fitzpatrick et al., 2004).

The board should provide development in the areas for evaluation, such as fiduciary management, organizational governance, and resource management (Carver, 2006). It should also collaborate with the CEO and human resource educator in selecting methods of evaluation most suitable for board, training needed for implementation of evaluation, and so forth (Fitzpatrick et al., 2004; Greenleaf, 1977).

### **The Board Provides Development in Corporate Sustainability**

Next, in order for a non-profit organization to fulfill its mission and vision, it needs to be self-sustaining (York, n. d.). This requires a board of directors to learn about sustainability, or “... an economic, social, and environmental concept that involves meeting the needs of the present without compromising the ability of future generations to meet their own needs” (Canada Mortgage and Housing Corporation, 1996-2009, ¶1). Wilson (2003, p. 5) explains corporate sustainability and its four components.

Corporate sustainability is a new and evolving corporate management paradigm. Although the concept acknowledges the need for profitability ...it places a much greater emphasis on environmental, social, and economic performance, and the public reporting on this performance. Sustainable development sets out the performance areas that companies should focus on, and also contributes the vision and societal goals that the corporation should work toward, namely environmental protection, social justice and equity, and economic development. Corporate social responsibility contributes ethical arguments and stakeholder theory provides business arguments as to why corporations should work towards these goals. Corporate accountability provides the rationale as to why companies should report to society on their performance in these areas.

Another approach to corporate sustainability is York's (n. d., p. 11) Sustainability Formula: "Leadership + Adaptability + Program Capacity = Sustainability." Leadership includes unambiguous mission and vision, and stakeholder engagement, while Adaptability includes funding and funding trend information, program evaluation, and advanced financial management. Program Capacity involves suitable facilities and trained program staff (York, n. d.). Regardless of the approach, it is crucial that the board, CEO, staff, and other key stakeholders consider the reasons and plans for, danger signs related to, and ways to evaluate and advance corporate sustainability.

### **The Board Provides Development in Ethics**

Underpinning the governing role of the board of directors is ethics. Simply, ethics is "separating right from wrong" (DuBrin, 2004, p. 168). It also refers to suitable parameters of behavior for groups or organizations (Clawson, 2002). Ethical behavior is especially critical in decision-making and in relationships with board members, CEO, staff, and other stakeholders. DuBrin (2004) submits five behaviors of ethical leadership that include being frank and principled; being sincere to all stakeholders; creating agreement; respecting people, and achieving ethical outcomes.

Furthermore, ethical behavior can be encouraged by asking hard questions about corporate matters and providing case studies, role play, and inventories on ethics and ethical behavior. Also, a board of directors can foster an ethical organization by 1) using written codes of conduct; 2) protecting whistleblowers; 3) leading by example; 4) offering instruction in ethical responsibilities; and 5) establishing processes for addressing ethical dilemmas (DuBrin, 2004).

### **The Board Provides Development in Facilitation Skills**

Another area of board development is facilitation skills. McCain and Tobey (as cited in Lyres, 2007, p. 1) define facilitation as "the art of bringing adults together with the learning, by helping adults learn through self-discovery." Successful facilitation accentuates the gain and application of knowledge,

skills, attitudes, and abilities (Lyres, 2007). Facilitators share control with learners, target the learner(s), and possess a reputation for developing and maintaining a supportive learning atmosphere (Knowles et al., 2005). Facilitation skills are necessary for such work as board meetings, board development program, board meetings, board committee work, and organizational partnership meetings.

### **The Board Provides Development in Financial Management**

Directors need development in effectively managing the company's finances. It is imperative that the board possesses the knowledge, skills, attitudes, and abilities in this area. Examples of some tasks necessary to this area are budget development, comprehension of fiscal spreadsheets, financial audits, trends (local, national, and international) affecting the non-profit sector, the organization, and investments.

In addition, a part of properly managing the organization's finances is to recognize the danger signs in organizational finances. According to the U. S. Department of Health and Human Services, Health Resources and Services Administration, Bureau of Primary Health Care (2000), these signs include 1) decreased revenue sources, and 2) increased major expenditures. Regarding revenue sources, all non-profit entities rely upon key sources of revenue (e.g., service fees, Federal or State grants). It is crucial that a board "pay close attention to any changes in the law, policies, or fiscal situation of its funding sources, especially those that will have an obvious impact on the availability or amount of funding" (U. S. Department of Health and Human Services, Health Resources and Services Administration, Bureau of Primary Health Care, 2000, p. 14).

Similarly, it is the board's duty to exercise vigilance in monitoring increased expenses, particularly in contractual services, employees' salaries and benefits, miscellaneous expense account spending, and overdue bills (U. S. Department of Health and Human Services, Health Resources and Services Administration, Bureau of Primary Health Care, 2000; Wilbur, 2000).

### **The Board Provides Development in Fundraising**

A closely related task to financial management is fundraising. Fundraising is one of the life streams of the non-profit organization. It enables the organization to be self-sustaining, thereby increasing the organization's ability to fulfill its mission. Wilbur (2000, p. 97) states, "...fundraising is an essential element for your non-profit organization's continued viability and success." According to Giving USA Foundation™ (2009), charitable giving in the United States exceeded \$300 billion in 2007 and 2008, with \$314.07 billion in 2007 and \$307.65 billion in 2008.

Funding for the non-profit organization comes through various sources. Some of them are noted below (Fritz, 2009; Wilbur, 2000):

- Annual Fund – This involves soliciting gifts on a yearly basis.
- Individuals – This involves appeals for contributions.
- Corporations – This usually includes sponsorships, in-kind contributions, charitable giving, and marketing budgets.
- Foundations – Private and corporate entities that provide funding for special purposes.
- Federal, State, and Municipal governments – These entities have tax-based dollars.
- Grants – Monies, goods, and services that are provided without repayment.
- Sales of products and services – The organization receives revenues from its sales.
- Trade and Professional Associations – The support of projects related to their business or membership.

### **The Board Provides Development in Grant Writing**

A critical and closely affiliated area with fundraising is grant writing. Grant writing (Wilbur, 2000) involves submitting an application and proposal to a funding organization to obtain money and other resources, generally for starting a non-profit organization or building capacity. The board, in

collaboration with the CEO, senior administrators, and staff, participate in grant writing, which can be very challenging.

### **The Board Provides Development in Laws Affecting the Non-profit Organization**

It is important that the board is very knowledgeable of the Federal, State, and Municipal laws that affect the organization (Wallace, 2005; Wilbur, 2000). In addition, there are other laws, statutes, ordinances, and acts that affect corporate operations. For instance, a health care non-profit organization in Louisiana with medical and nursing staffs is accountable to the Louisiana State Board of Medical Examiners and the Louisiana State Board of Nursing, based upon related Physician and Nurse Practice Acts (Louisiana State Board of Medical Examiners, 2007; Louisiana State Board of Nursing, 2004).

One of the most important acts passed within the past decade that affects corporations is the American Competitiveness and Corporate Accountability Act of 2002, which is better known as the Sarbanes-Oxley Act (American Bar Association, Division of Legal Services, 2009; Budak, 2003). The Act was passed after several organizational scandals, and was intended to rebuild public trust in the business sector. Of the more than 60 sections of this act, only two of them directly affect non-profit organizations. These two sections are noted below (Budak, 2003, p. 2):

It is a federal crime for anyone to "knowingly, with the intent to retaliate, take any action harmful to any person . . . for providing to a law enforcement officer any truthful information relating to the commission of a federal offense. It is a federal crime to alter, cover up, falsify, or destroy any document or make a false entry in accounting records with the intent of obstructing a federal investigation.

Though most of this act affects for-profit entities, it is expedient that non-profit entities consider using the for-profit sections as guidelines to improve their operations (Budak, 2003).



### **The Board Provides Development in Leadership and Management**

To successfully lead an organization, it is necessary for the board to distinguish between leadership and management. DuBrin (2004) contrasts leadership and management. He asserts that leadership addresses change, inspiration, motivation, and influence, while management deals with planning, organizing, and controlling. In board development, it is important for a board to understand that it leads and manages the organization. Greenleaf (1977, p. 109) explains, “Trustees as a body are legally in charge, and they manage the institution.” In addition, a board is to understand how the concepts of leadership and management are manifested throughout the organization. It must also learn more effective means in leading and managing the organization, in collaboration with senior administrators and staff.

### **The Board Provides Development in Policy Development**

Policy development is the core of board governance. Policy is necessary for setting the direction of the organization. Leadership is provided through policy development. Policies necessarily reflect the values of the organization, and should be congruent with the organization’s mission (Carver, 2006; U. S. Department of Health and Human Services, Health Resources and Services Administration, Bureau of Primary Health Care, 2000). Additionally, policy is created to 1) achieve the organization’s mission; 2) respond to a need within the community; and 3) respond to a policy change from a funding entity (U. S. Department of Health and Human Services, Health Resources and Services Administration, Bureau of Primary Health Care, 2000).

### **The Board Provides Development in Public/Community Relations**

As ambassadors of the organization, it is necessary for a board to receive development in public/community relations. The board functions as a liaison between the organization and the public. According to the U. S. Department of Health and Human Services, Health Resources and Services

Administration, Bureau of Primary Health Care (2000), the board represents 1) the organization and its mission to the public, and 2) the public and its needs to the organization.

Public/community relations come in various forms. Some examples of this include participating in community activities (e.g., local Chamber of Commerce, county/parish 4-H Club events, health fair for senior citizens); promoting the services of the organization through media; speaking to civic groups; and conversing with the public or community about the organization's programs and services. Waters (2007), in his study of non-profit board members, discovered that board members most often use public relations to initiate community relationships. They also use public relations to ascertain financial accountability, plan for the organization's future, and give general support to the organization. Thus, interaction between the organization and the community through the board of directors is necessary to ensure that the organization is effectively achieving its mission within the community, and to obtain feedback and support from the community.

### **The Board Provides Development in Real Estate Management**

The board should provide development in the area of real estate management (e.g., buildings, properties, fixtures, etc.). It is important for the organization to have an organizational property strategy to protect the organization from risk (Roulac, 2001). In contrast, sound organizational strategies augment the organization's primary competencies by (Roulac, 2001, p. 149):

- Creating and retaining customers
- Attracting and retaining outstanding people
- Contributing to effective business processes to optimize productivity
- Promoting the enterprise's values and culture
- Stimulating innovation and learning; and
- Enhancing shareholder wealth

Organizational property strategies should interrelate with organizational business strategy, according to Nourse and Roulac (1993). They (as cited in Roulac, 2001, p. 142) offer,

Among the corporate real estate strategies identified are: minimize occupancy cost; increase flexibility; promote human resources objectives; promote marketing message; promote sales and selling process; facilitate production, operations, services delivery; facilitate managerial process; and capture the real estate value creation of business.

Hence, board members need to learn and apply organizational real estate strategies in becoming more effective directors, and maximizing networking opportunities for customers and resources.

### **The Board Provides Development in Relationships with Company Staff**

Board directors can also learn to facilitate their relationship with organizational staff through participation in board development. As noted previously, the directors' participation in board development leads to improved relationships between the board and staff (Boulton, 2003). For example, it is important that the board understand the difficulties faced by a CEO. Orlikoff (2005) acknowledges while a healthcare board faces many challenges, the CEO encounters greater pressure in building a good relationship with the board to whom the CEO is accountable. Thus, board development provides opportunities for board members to receive education and training on the roles and responsibilities of the board and organizational staff and their relational dynamics.

Next, board development promotes the importance of the board leading the organization, with the staff implementing organizational goals and objectives with the support and supervision of the CEO and senior managers (McNamara, 1997-2008). Furthermore, board development helps board directors to recognize the value of staff and its contributions to the organization, its stakeholders, and its success (McNamara, 1997-2008; U. S. Department of Health and Human Services, Health Resources and Services Administration, Bureau of Primary Health Care, 2000).

### **The Board Provides Development in Short- and Long-term Planning**

Another essential responsibility of board trustees is short- and long-term planning. In board development, the board should teach its members the concepts of short and long-term planning. The differences between short-term (or annual) and long-term (or strategic) planning are as noted (U. S. Department of Health and Human Services, Health Resources and Services Administration, Bureau of Primary Health Care, 2000; Wilbur, 2000):

- Short-term planning - Plans are specific. Goals last one year, and are based upon long-term planning. The plans focus upon redirection or reassessment of goals.
- Long-term planning - Plans are broad, continuous, and futuristic. They guide the board and administrators in achieving mission-related goals over three to five years. The plans also address critical issues of the organization.

Overall, planning is continuous and flexible, based on the needs of the board and the organization. Implementation of goals related to short-term and long-term planning should be carried out by the CEO and staff, in conjunction with continuing board and corporate evaluations (U. S. Department of Health and Human Services, Health Resources and Services Administration, Bureau of Primary Health Care, 2000). Finally, the achievement of goals should be celebrated by the board, CEO, and staff!

### **The Board Provides Development in Technical Management**

It is important that the board provides development in technical management, or the management of change. Technical management, according to Chanaron and Grange (2006, p. 2), is

The management of innovation, whether it be a project, a process, or an organization from its conception to its diffusion, and therefore its implementation within the company, including the consequences, advantages and disadvantages for all of the variables and actors involved in running the company.

The management of change is particularly crucial because of the complexity of the non-profit organization; the interaction with a global economy; the increasing demand for organizational accountability from stakeholders (internal and external); the increasing competition for human, fiscal, and other resources; and the burgeoning changes in information and technology (Carver, 2006; Chanaron & Grange, 2006; Gardner, 2006; Greenleaf, 1977).

### **The Board Members Offer Suggestions for Board Development Activities**

Board members, in taking responsibility for their own development, must offer recommendations and feedback for board development activities. Suggestions may come from best practice recommendations, current board experience, desire to change board governing structure, findings from corporate audits, literature review, etc. (Fitzpatrick et al., 2004; Hurd, 2004). In addition, experienced board members should assist new and inexperienced board members in assessing their learning needs for board development.

### **The Board Members Apply Information Learned in Development Activities to Corporate Governance Duties**

Finally, in participating in board development activities, it is essential that board members apply the information (i.e., knowledge, skills, attitudes) they have learned to govern the organization (Merriam & Caffarella, 1999). According to Knowles et al. (2005), adult learners (i.e., board members) are problem-centered, and want to learn what will help them address problems or perform tasks in life. Therefore, it is necessary for all board members to apply what they have learned to improve individual and board performance. Correspondingly, all board members must apply what they have learned to improve board and organizational performance (Gray & Herr, 1998; Ota et al., 2006). The application of knowledge, skills, and attitudes of board members to governance duties is an important area of board and organizational evaluations (Fitzpatrick et al., 2004). Furthermore, Adams (2003, ¶ 70) affirms:

A board's power is maximized when the trustees emphasize board education and gain knowledge of the many issues facing healthcare organizations. This power is strengthened further when the trustees focus on developing an effective relationship with the CEO and long-term strategies that are rooted in the foundational vision of the organization.

## **CHAPTER 3**

### **METHODOLOGY**

#### **Population, Frame, and Sample**

A population is defined as all individuals of a distinct group of people, objects, or occurrences (Ary, Jacobs, Razavieh, & Sorensen, 2006; Moore, 2004). In 2008, there were 19,648 non-profit organizations in Louisiana (National Center for Charitable Statistics, 1998-2008). According to the Louisiana Association of Non-Profit Organizations (2009), 1,260 organizations were members of the state's association of non-profit organizations. The board members served on organizations providing services in such areas as arts and entertainment; business; education; health care and social services; law; and religion (Louisiana Association of Non-Profit Organizations, 2009).

A target population encompasses the group of subjects to which the researcher makes deductions (Ary et al., 2006; Groves et al., 2004). Thus, the target population for this study was all members of the boards of directors of non-profit organizations in the United States. The accessible population, or the available group of subjects (Ary et al., 2006; Trochim, 2006), for this study were board members of selected non-profit organizations in Louisiana.

Next, the sampling frame, or the system used to identify subjects of the target population (Groves et al., 2004; Trochim, 2006), included board members of non-profit organizations in Louisiana that were members of the state's association of non-profit organizations. The sample, or the group from the population identified for investigation (Ary et al., 2006; Moore, 2004), consisted of 267 non-profit organizations. The CEOs and/or board presidents of the selected organizations were asked to have five board members to complete the survey for a total of 1,335 board members. Sample size was established for continuous and categorical data (Appendix L) using Cochran's (1977) formula (Bartlett, Kotrlik, & Higgins, 2001).

Non-profit organizations for the survey were selected by cluster sampling (Ary et al., 2006; Groves et al., 2004) from an alphabetized membership list from the state's non-profit association (Louisiana Association of Non-Profit Organizations, 2009). Organizations were further selected through systematic random sampling of every fifth organization (Ary et al., 2006; Moore, 2004).

### **Instrumentation**

The instrument for this study, the Hollins Board Development Survey, was a researcher-designed questionnaire (Appendix A). It was based upon the empirical literature review on board development, the researcher's doctoral committee's expertise in instrument development; the researcher's extensive experience and training in board and organizational governance; and a needs assessment survey previously devised by the researcher. The 52-item questionnaire contained three sections: board development activities, board appointment experience, and demographic information.

Quantification of responses on perceptions of board development activities was determined through the use of a five-point anchored rating scale (Ary et al., 2006; Thomas & Nelson, 1985). Each response received one of the following scores: 1 (never), 2 (rarely), 3 (sometimes), 4 (usually), and 5 (always). The 33 items for perceptions of board development activities included provision of board development; participation in board development; prioritization of board development; board orientation; needs assessment; board development resources; suggestions for board development; and application of board development information.

The remaining topics about perceptions of board development activities focused on areas for board development, as noted below:

- General board responsibilities
- Board and organizational evaluations
- Corporate operations



- Corporate sustainability
- Ethics
- Facilitation skills
- Financial management
- Fundraising
- Grant writing
- Laws affecting the non-profit organization
- Leadership and management
- Policy development
- Public/community relations
- Real estate management
- Relationships with company staff
- Short- and long-term planning
- Technical management

Next, there were 14 items ascertaining the respondents' board appointment experience. Several items included reasons for non-profit board appointment; number of years served as a non-profit board member; length of time as a non-profit board member; number of non-profit boards appointments; roles served as a non-profit board member; specific areas of board development offerings; preferred learning delivery methods for board development activities; and areas of board development applied to employment or non-profit organization. Other items in this category included presence of board job descriptions; annual evaluation of board member performance; appointment to a for-profit board; length of for-profit appointment; opportunities related to board development; size of the non-profit organization;

and size of the non-profit board. Lastly, five items ascertained respondents' demographic characteristics (i.e., age of board member, gender, highest educational level, primary occupational area, and race).

### **Validity and Reliability**

Validity, or “the extent to which an instrument measured what it claims to measure” (Ary et al., 2006, p. 243), is the most significant factor in creating and appraising measurement tools (Ary et al., 2006). For this study, content validity was used in evaluating the research instrument. Content validity was judged by two entities. First, the researcher's doctoral advisory committee, who were expert in instrument development, determined whether or not the survey measured what it was supposed to measure (Ary et al., 2006; Warmbrod, 2001). Second, a group of 10 non-profit board members whose organizations were not members of the state's non-profit association (i.e., using subjects not included in the sample) also evaluated the instrument by completing the survey on paper.

In assessing content validity, the researcher's doctoral advisory committee and the group of non-profit board members were asked to appraise the following aspects of the questionnaire (Groves et al., 2004; Thomas & Nelson, 1985):

- Wording of questions
- Structure of questions
- Response alternatives
- Order of questions
- Instructions for taking the questionnaire
- Navigational rules of the questionnaire

Prior to conducting this study, the researcher completed the NCI (National Cancer Institute) Human Research Participants online course (Appendix H); and received survey approval from the Institutional Review Board (IRB) of Louisiana State University (Approval Request #E4885) (Appendix

I). Based upon the recommendations of the researcher's doctoral advisory committee and the group of non-profit board members, the researcher made changes to the questionnaire before dissemination to final subjects (VanTeijlingen & Hundley, 2001).

For this study, the researcher tested the survey scale for reliability, or precision of the measuring scale (Ary et al., 2006; Hair, Black, Babin, Anderson, & Tatham, 2006). Through the Statistical Package for the Social Sciences [SPSS] (2009) Statistics, Cronbach alpha, a measure of internal consistency, was used to estimate reliability (Hair et al., 2006). A reliability coefficient (alpha) of 0.70 or higher is considered an acceptable level of reliability. The reliability coefficient for the Hollins Board Development Survey scale was 0.98.

### **Data Collection**

The researcher communicated face-to-face and/or teleconference with the CEOs of the selected 267 non-profit organizations, for their permission, cooperation, and facilitation in surveying board members (Appendix B). The researcher answered questions posed by CEOs and/or board presidents; offered to attend their board meetings to discuss the research project and present research findings, conclusions, and recommendations; and assured them of the confidentiality of responses; and asked that at least five board members (approximately 25 percent of members) complete the survey. Notably, the CEOs and/or board presidents, in general, expressed reluctance in providing the researcher with board members' e-mail addresses. They strongly expressed their preference in disseminating the survey weblink and other research-related communications to their board members.

All board members were sent a request for their involvement in the study through the CEOs and/or board presidents, and were encouraged to contact the researcher for any questions or further information (Appendix C). Additionally, all members of the sample were sent a pre-contact e-mail 1) explaining the need for and purpose of the study; 2) notifying them of the survey distribution; and 3) informing them of

special accommodations for completing the survey (Appendix D). This occurred four to six weeks before dissemination of the instrument.

Approximately two weeks in advance of launching the survey, the CEOs and/or board presidents were notified via e-mail of the weblink for direct access to the online survey. They were asked again to disseminate this information to board members participating in the study. Also, the researcher reiterated to CEOs and/or board presidents, and board members the confidentiality of responses, and reminded them that the survey would take 15 minutes to complete. Subjects were asked to complete the survey by January 31, 2010. Those requiring special accommodations were asked to contact the researcher by telephone or electronic mail, so reasonable assistance could be provided, such as providing a paper survey; reading survey questions; sending a stamped, self-addressed envelope to subject for survey return; etc. One survey respondent requested and received a paper survey, which was completed and returned promptly.

Within two weeks of the initial distribution of the survey, participants received a note of appreciation for participating in the survey, if they had done so, and asked to reply if they had not (Appendix E). Approximately one month after the distribution of the survey to participants, an e-mail was sent to CEOs to forward to board members who had not completed the survey, stressing the importance of and encouraging their participation in the survey (Appendix F). The Zoomerang™ online weblink for the Hollins Board Development Survey was provided again. A final reminder was sent via e-mail approximately six weeks after initial survey distribution (Appendix G).

Participants responded to the survey from January 12, 2010 to February 21, 2010 (Table 2). The largest number of participants (n=43, 3.2%) responded after the first invitation of January 12, 2010, with the second largest number of participants (n=29, 2.2%) responding after the second invitation of January 22, 2010. The fewest number of participants (n=14, 1.0%) responded after the fourth invitation of

February 11, 2010. Finally, early (January 12-21, 2010) and late (February 11-21, 2010) respondents were compared on their responses to the 33 board development activities items. Using a two-tailed t-test (Miller & Smith, 1983), the comparison showed no significant differences between early ( $n=40$ ,  $M=3.04$ ,  $SD=0.94$ ) and late ( $n=44$ ,  $M=3.08$ ,  $SD=0.92$ ) respondents. Of the 110 board members who responded to the survey, 84 provided usable data.

Table 2  
Response Patterns by Board Members of Selected Non-profit Organizations in Louisiana to the Hollins Board Development Survey

Invitation	Date	Method	n <sup>a</sup>	%
First (Letter to Survey Participants)	January 12, 2010	E-mail	43	3.2
Second (First Reminder)	January 22, 2010	E-mail	29	2.2
Third (Second Reminder)	February 3, 2010	Zoomerang™ and E-mail	24	1.8
Fourth (Third Reminder)	February 11, 2010	E-mail	14	1.0
Total			110	8.2

*Note.* One thousand, two hundred twenty-five participants did not complete the survey.

<sup>a</sup>Only 84 respondents provided usable data.

## Data Analysis

In this study, data analysis was organized by individual objectives. The first objective of the study was to describe board members of selected non-profit organizations in Louisiana on the following selected demographic characteristics:

- a) Gender
- b) Race
- c) Highest educational level
- d) Age of board member
- e) Primary occupational area

Board members' demographic characteristics were described using frequencies and percentages.

The second objective of the study was to describe board members of selected non-profit organizations in Louisiana on areas related to their board appointment experience:

- a) Reasons for non-profit board appointment
- b) Length of time as a non-profit board member
- c) Number of non-profit board appointments
- d) Roles served as a non-profit board member
- e) Specific areas of board development offerings
- f) Preferred learning delivery methods for board development activities
- g) Areas of board development applied to employment or non-profit organization
- h) Presence of board job descriptions
- i) Annual evaluation of board member performance
- j) Appointment to a for-profit board
- k) Length of for-profit board appointment
- l) Opportunities related to board development
- m) Size of the non-profit organization
- n) Size of the non-profit board

For this objective, board members' board appointment experience was described using frequencies and percentages.

The third objective was to determine perceptions of board members of selected non-profit organizations in Louisiana on board development activities:

- a) Board roles and responsibilities
- b) Board evaluation

- c) Corporate evaluation
- d) Corporate operations
- e) Corporate sustainability
- f) Ethics
- g) Facilitation skills
- h) Financial management
- i) Fundraising
- j) Grant writing
- k) Laws affecting the non-profit organization
- l) Leadership skills
- m) Management skills
- n) Orientation
- o) Policy development
- p) Public/community relations
- q) Real estate management
- r) Relationship with corporate staff
- s) Short-term planning
- t) Long-term planning
- u) Technical management

Board members' perceptions were measured by the Hollins Board Development Survey. This objective was descriptive and analyzed through means and standard deviations on summated scores.

Next, the fourth objective was to determine if a relationship exists between the size of the non-profit board and the presence of board development activities. This objective was measured using

ANOVA (analysis of variance), which was used to reveal the main effects of categorical independent variables on an interval dependent variable.

The fifth objective was to determine if a model exists explaining a significant portion of the variance in the Hollins Board Development Survey scores of board members of selected non-profit organizations in Louisiana on selected demographic measures:

- a) Gender
- b) Race
- c) Highest educational level
- d) Age of board member
- e) Primary occupational area
- f) Length of time on the board
- g) Number of non-profit boards served on
- h) Reasons for appointment to non-profit board
- i) Roles served as a non-profit board member
- j) Size of the non-profit organization
- k) Size of the non-profit board

This objective was examined using multiple regression analysis using the stepwise entry method (Hinkle et al., 2003; Trochim, 2006).

### **Pilot Study**

A three-week pilot was conducted to determine the validity and reliability of the Hollins Board Development Survey prior to the survey launch through Zoomerang™, an online survey system (Zoomerang™, 2009). The pilot test was conducted from the third week in December 2009 to the first week in January 2010. The instrument was piloted through purposive sampling of ten board members of



non-profit organizations that were not involved in the study (Trochim, 2006). There were slight delays in the return of survey comments, primarily because of personal illness, family, and work obligations.

The researcher contacted these board members by telephone or e-mail, after obtaining permission from the presidents of both organizations. Board members were asked to critique the survey and its accompanying instructions, using their board experience and the Critiquing Elements for Questionnaire/Survey instruction sheet, which was devised by the researcher (see Appendix J). The instruction sheet was based upon recommendations for instrument review (Ary et al., 2006; Groves et al., 2004; Thomas & Nelson, 1985; Warmbrod, 2001).

Board members indicated their responses to the 33 items in the Board Development Activities section by selecting 1 (never), 2 (rarely), 3 (sometimes), 4 (usually), or 5 (always). In addition, they selected the most appropriate response for the Board Appointment Experience and Demographic Information sections, which consisted of 15 and five items, respectively.

Upon submission of comments, the researcher expressed appreciation to each board member with an e-mail, a thank you greeting card, and a five-dollar gift card from an international retailer.

### **Findings of Pilot Study**

A total of nine surveys were returned for a survey response rate of 90.0%. Comments regarding the survey and its related instructions were received from 10 board members for a response rate of 100.0% (Appendix K). The pilot study revealed that all respondents felt the survey items were suitable for board members, with appropriate instructions and response alternatives. They added that the survey was well-ordered, well-structured, well-worded, easily managed, and easily completed within the recommended amount of time of 15 minutes.

## **CHAPTER 4**

### **RESULTS AND DISCUSSION**

The purpose of this study was to determine the perceptions of board members of selected non-profit organizations in Louisiana regarding board development. In addition, this study describes board members on selected demographic characteristics. From a sample size of 1,335, 110 board members responded to the survey for a final response rate of 8.2%. However, 84 of the respondents provided usable data (6.0%). Twenty-six respondents who provided unusable data were dropped from the study. Follow-up of non-respondents was not possible because the researcher did not have board members' e-mail addresses.

This chapter encompasses the results and analysis of the empirical examination of board members' perceptions on board development. Results correspond to research objectives one through five.

#### **Objective One**

The first objective of the study was to describe board members of selected non-profit organizations in Louisiana on the following selected demographic characteristics:

- a) Gender
- b) Race
- c) Highest educational level
- d) Age of board member
- e) Primary occupational area

#### **Gender**

The sample was first described on the variable "Gender", according to the question, "What is your gender?" The largest number of respondents indicated their gender as female (n=51, 60.7%). Thirty-three respondents indicated their gender as male (39.3%).

## **Race**

The sample was described secondly on the variable “Race”, according to the question, “What is your race?” The largest number of respondents was “White” (n=61, 72.6%), with the second largest number being “Black” (n=20, 23.8%). Two respondents (2.0%) were “American Indian or Alaskan Native” (2.4%), while one respondent was “Asian” (1.2%). Responses are displayed in Table 3.

Table 3  
Race of Board Member Respondents of Selected Non-profit Organizations in Louisiana As Measured by the Hollins Board Development Survey

Race	n	%
White	61	72.6
Black	20	23.8
American Indian or Alaskan Native	2	2.4
Asian	1	1.2
Latino	0	0
Pacific Islander	0	0
Other (Please specify)	0	0.0
Total	84	100.0

## **Highest Educational Level**

The third variable described from the sample was “Highest educational level” (Table 4). Answering the question, “What is your highest educational level completed?” the largest number of respondents possessed a “Master’s Degree” (n=31, 37.0%). The second largest number of respondents possessed a “Bachelor’s Degree” (n=27, 32.1%). The smallest number of respondents was “Other (Please specify)” (n=1, 0.9%; “Three years of college and six years at an art academy”).

Table 4

Highest Educational Level of Board Member Respondents of Selected Non-profit Organizations in Louisiana As Measured by the Hollins Board Development Survey

Educational Level	n	%
Less than High School	0	0.0
High School Diploma/General Equivalency Diploma	0	0.0
Vocational-Technical Diploma	0	0.0
Some College	0	0.0
Associate's Degree	5	6.0
Bachelor's Degree	27	32.1
Master's Degree	31	37.0
Doctoral Degree	20	24.0
Other (Please specify)	1	0.9
Total	84	100.0

<sup>a</sup>“Other (Please specify)”: “Three years of college and six years at an art academy” (n=1, 0.9%).

### Age of Board Member

The fourth variable in this sample was “Age of board member.” Respondents were asked, “What is your age at your last birthday?” Their ages, which ranged from 25 to 74 (n=84, M=50.14, SD=11.24), were categorized as follows: 1) 20-29; 2) 30-39; 3) 40-49; 4) 50-59; 5) 60 and above (Table 5). The largest number of respondents were between 50-59 years (n=34, 40.5%). The second largest number of respondents were between 40-49 years (n=17, 20.2%). The smallest number of respondents were between 20-29 years (n=2, 2.4%).

Table 5

Age Distribution of Board Member Respondents of Selected Non-profit Organizations in Louisiana  
As Measured by the Hollins Board Development Survey

Age Distribution	n <sup>a</sup>	%
20-29	2	2.4
30-39	15	17.9
40-49	17	20.2
50-59	34	40.5
60 and above	16	19.0
Total	84	100.0

<sup>a</sup> $M=50.14$ ,  $SD=11.24$ .

### Primary Occupational Area

The primary occupational area of the board members was also examined (Table 6), based upon the question, “What industry do you work in primarily?” The first and second categories chosen most often by respondents were “Other” (n=23, 27.4%) and “Health Care” (n=18, 21.4%). The smallest number of respondents were “Marketing/Real Estate/Sales” (n=2, 2.4%). The “Other” category (n=23) consisted of 11 responses which fell into four areas as reported by respondents: “Arts/Theatre” (n=3, 2.7%), “Law/Legal/Music” (n=3, 2.7%), “Non-profit/non-profit evaluation consulting/non-profit community organization” (n=3, 2.7%), and “Social Services” (n=2, 1.8%). The 12 remaining areas, which had one response each, included “Advocacy for individuals with disabilities” (0.9%), “Architecture” (0.9%), “Boy Scouts” (0.9%), “Church” (0.9%), “Construction” (0.9%), “Creative/Photography” (0.9%), “Home” (0.9%), “Media” (0.9%), “Philanthropic foundation” (0.9%), “Public health” (0.9%), “Volunteer” (0.9%), and “Wildlife/Research” (0.9%).

Table 6

Primary Occupational Area of Board Member Respondents of Selected Non-profit Organizations in Louisiana As Measured by the Hollins Board Development Survey

Primary Occupational Area	n	%
Other (Please specify) <sup>a</sup>	23	27.4
Health Care	18	21.4
Education	13	15.5
Administration	12	14.3
Government	6	7.0
Finance/Accounting	5	6.0
Human Resources	5	6.0
Marketing/Real Estate/Sales	2	2.4
Hospitality	0	0.0
Information Technology	0	0.0
Total	84	100.0

<sup>a</sup>“Other (Please specify)”: “Arts/Theatre” (n=3, 2.7%), “Law/Legal/Music” (n=3, 2.7%), “Non-profit/non-profit evaluation consulting/non-profit community organization” (n=3, 2.7%), “Social Services” (n=2, 1.8%). “Advocacy for individuals with disabilities” (n=1, 0.9%), “Architecture” (n=1, 0.9%), “Boy Scouts” (n=1, 0.9%), “Church” (n=1, 0.9%), “Construction” (n=1, 0.9%), “Creative/Photography” (n=1, 0.9%), “Home” (n=1, 0.9%), “Media” (n=1, 0.9%), “Philanthropic foundation” (n=1, 0.9%), “Public health” (n=1, 0.9%), “Volunteer” (n=1, 0.9%), and “Wildlife/Research” (n=1, 0.9%).

## Objective Two

The second objective of the study was to describe board members of selected non-profit organizations in Louisiana on areas related to their board appointment experience:

- a) Reasons for non-profit board appointment
- b) Length of time as a non-profit board member

- c) Number of non-profit board appointments
- d) Roles served as a non-profit board member
- e) Specific areas of board development offerings
- f) Preferred learning delivery methods for board development activities
- g) Areas of board development applied to employment or non-profit organization
- h) Presence of board job description
- i) Annual evaluation of board member performance
- j) Appointment to a for-profit board
- k) Length of for-profit board appointment
- l) Opportunities related to board development
- m) Size of the non-profit organization
- n) Size of the non-profit board

### **Reasons for Non-profit Board Appointment**

Participants were surveyed on the question, “What were the reasons for your non-profit board appointment?” Respondents selected all reasons applicable to their appointments. Because of the participants’ multiple-choice responses, the total percentage did not equal 100.0%. The first and second most frequent responses were “Contacts/Network” (n=46, 54.8%), and “Advocacy expertise” (n=40, 47.6%). The least frequent response was “Gender” (n=6, 7.1%). There was a tie between “Financial expertise” (n=18, 21.4%), and “Other (Please specify)” (n=18, 21.4%). In examining the “Other” responses, respondents provided 18 reasons for their appointments. Some reasons were “Board training program; volunteered to sign up” (1.2%); “Cheerleader and fun” (1.2%); “Commitment to helping those less fortunate” (1.2%); “Evaluation experience” (1.2%); “Experience with the cause” (1.2%); “Family member served by agency and our board always wants to have some of our constituents represented”

(1.2%); “Founder and a medical professional/prior extensive community service involvement” (1.2%); and “I am actually the coordinator for a non-profit; therefore, the board liaison” (1.2%).

Additional reasons for “Other (Please specify)” included “Knowledge of the business” (1.2%); “Legal expertise” (1.2%); “Long-time relationship with non-profit organization” (1.2%); “Marketing” (1.2%); “Occupation, location, and personal interest” (1.2%); “Past board experience” (1.2%); “Pediatric awareness” (1.2%); “Professional in field that organization represents” (1.2%); “Quality improvement” (1.2%); and “Volunteer involvement” (1.2%). All responses are displayed in Table 7.

Table 7  
Reasons for Non-profit Board Appointment to Selected Non-profit Organizations in Louisiana  
As Measured by the Hollins Board Development Survey

Reasons for Board Appointment	n	% <sup>a</sup>
Contacts/Network	46	54.8
Advocacy expertise	40	47.6
Management expertise	34	40.5
Financial expertise	18	21.4
Other (Please specify) <sup>b</sup>	18	21.4
Fundraising expertise	17	20.2
Race	10	11.9
Grant writing expertise	7	8.3
Gender	6	7.1

<sup>a</sup>Respondents selected all reasons applicable to their appointments. Percentages will not total 100.0%.

<sup>b</sup>“Other (Please specify)”: “Board training program; volunteered to sign up” (n=1, 1.2%); “Cheerleader and fun” (n=1, 1.2%); “Commitment to helping those less fortunate” (n=1, 1.2%); “Evaluation experience” (n=1, 1.2%); “Experience with the cause” (n=1, 1.2%); “Family member served by agency and our board always wants to have some of our constituents represented” (n=1, 1.2%); “Founder and a medical professional/prior extensive community service involvement” (n=1, 1.2%); and “I am actually the coordinator for a non-profit; therefore, the board liaison” (n=1, 1.2%); “Knowledge of the business” (n=1, 1.2%); “Legal expertise” (n=1, 1.2%); “Long-time relationship with non-profit organization” (n=1, 1.2%);



“Marketing” (n=1, 1.2%); “Occupation, location, and personal interest” (n=1, 1.2%); “Past board experience” (n=1, 1.2%); “Pediatric awareness” (n=1, 1.2%); “Professional in field that organization represents” (n=1, 1.2%); “Quality improvement” (n=1, 1.2%); and “Volunteer involvement” (n=1, 1.2%).

### **Length of Time as a Non-profit Board Member**

Length of time on the non-profit board was also investigated (Table 8). Respondents were described based upon their responses to the question, “How long have you been a non-profit board member?” The largest group of respondents (n=42, 50.0%) noted “1-5 years” as a board member. The second largest group of respondents (n=18, 21.4%) indicated “6-10 years”. There was a tie for the fewest number of respondents between “Less than 1 year” (n=5, 6.0%) and “16-20 years” (n=5, 6.0%).

Table 8  
Length of Time Served on the Non-profit Board by Board Member Respondents of Selected Non-profit Organizations in Louisiana As Measured by the Hollins Board Development Survey

Length of Service	n	%
Less than 1 year	5	6.0
1-5 years	42	50.0
6-10 years	18	21.4
11-15 years	8	9.5
16-20 years	5	6.0
21 or more years	6	7.1
Total	84	100.0

### **Number of Non-profit Board Appointments**

Next, participants were investigated on the number of non-profit boards on which they have served (Table 9). They were asked, “How many non-profit boards have you served on?” The greatest number of respondents (n=44, 52.4 %) declared “1-3” boards, with the second greatest number of

respondents (n=24, 28.6%) declaring “4-6” boards. The fewest number of respondents (n=4, 4.8%) noted “10-12” boards.

Table 9  
Number of Non-profit Board Appointments of Respondents from Selected Non-profit Organizations in Louisiana As Measured by the Hollins Board Development Survey

Number of Non-profit Boards	n	% <sup>a</sup>
1-3	44	52.4
4-6	24	28.6
7-9	8	8.3
10-12	4	4.8
13 or more	5	6.0
Total	84	100.0

### **Roles Served as a Non-profit Board Member**

Participants were also surveyed on the roles served as a non-profit board member, according to the question, “In what role(s) have you ever served as a non-profit board member?” Respondents were instructed to select all roles in which they have served. Because of the participants’ multiple-choice responses, the total percentage did not equal 100.0% (Table 10). The first and second most frequent responses were “Board member” (n=78, 92.9%), and “Board Committee Chair” (n=51, 60.7%), respectively. In contrast, the least frequent response was “Other (Please specify)” (n=7, 8.3%). This response consisted of five roles: “CEO/Executive Director” (n=3, 3.5%); “Advisory” (n=1, 1.2%); “Board committee member numerous times” (n=1, 1.2%); “Event chair and co-chair for fundraisers” (n=1, 1.2%); and “Ex-officio” (n=1, 1.2%).

Table 10

Roles Served by Board Member Respondents of Selected Non-profit Organizations in Louisiana  
As Measured by the Hollins Board Development Survey

Roles	n	% <sup>a</sup>
Board Member	78	92.9
Board Committee Chair	51	60.7
Board Chair	42	50.0
Board Vice-Chair	31	36.9
Board Secretary	25	29.8
Board Treasurer	18	21.4
Other (Please specify)	7	8.3

<sup>a</sup>Respondents selected all roles served as a non-profit board member. Percentages did not total 100.0%.

<sup>b</sup>“Other (Please specify)”: “CEO/Executive Director” (n=3, 3.5%); “Advisory” (n=1, 1.2%); “Board committee member numerous times” (n=1, 1.2%); “Event chair and co-chair for fundraisers” (n=1, 1.2%); and “Ex-officio” (n=1, 1.2%).

### Specific Areas of Board Development Offerings

The areas of board development offerings were ascertained by the question, “What specific areas of board development would you like offered?” Respondents chose all areas of interest to them. Because of the participants’ multiple-choice responses, the total percentage did not equal 100.0%. The first and second areas chosen most often by respondents were “Short- and long-term planning” (n=52, 61.9%) and “Board roles and responsibilities” (n=49, 58.3%), respectively. The smallest number of respondents selected “Real estate management” (n=3, 3.6%). All responses are shown in Table 11.

Table 11

Specific Areas of Board Development Offerings Desired by Board Member Respondents of Selected Non-profit Organizations in Louisiana As Measured by the Hollins Board Development Survey

Areas of Offerings	n	% <sup>a</sup>
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Table Continued

Short- and long-term planning	50	59.5
Board roles and responsibilities	48	57.1
Laws affecting non-profit organizations	41	48.8
Financial management/Fundraising/Grant writing	36	42.9
Public/community relations	34	40.5
Leadership	32	38.1
Policy development	32	38.1
Ethics	27	32.1
Board and corporate evaluations	22	26.2
Management	18	21.4
Facilitation of groups/meetings	16	19.0
Corporate operations	12	14.3
Technical management	11	13.1
Real estate management	3	3.6
Other (Please specify)	0	0.0
Total		

<sup>a</sup>Respondents suggested all areas of interest to them. Thus, percentages did not total 100.0%.

### **Preferred Learning Delivery Methods for Board Development Activities**

Survey participants were asked about their preferred learning delivery methods. This information was garnered by the question, “What learning delivery methods would you prefer for board development activities?” Respondents chose all methods of interest to them. Because of the participants’ multiple-choice responses, the total percentage did not equal 100.0%. The methods selected most often by

respondents were “Conference/Seminar” (n=50, 59.5%) and “Group (Small/Large)” (n=48, 57.1%), respectively. The smallest number of respondents selected “Other (Please specify)” (n=1, 1.2%). All responses are shown in Table 12.

Table 12  
Preferred Learning Delivery Methods of Board Member Respondents of Selected Non-profit Organizations in Louisiana As Measured by the Hollins Board Development Survey

Delivery Methods	n	% <sup>b</sup>
Conference/Seminar	50	59.5
Group (Small/Large)	48	57.1
Computer-based (compact disc, digital video disc)	27	32.1
Web-conference	26	31.0
Classroom	22	26.2
Coaching/Mentoring	21	25.0
Videoconference	18	21.4
Teleconference	12	14.3
Self-paced (electronic, books, journals, tapes)	11	13.1
Other (Please specify) <sup>a</sup>	1	1.2

<sup>a</sup>Other (Please specify): “Least expensive and most easily accessible method”.

<sup>b</sup>Respondents suggested all areas of interest to them. Thus, percentages did not total 100.0%.

### **Areas of Board Development Applied to Employment or Non-profit Organization**

Survey respondents were asked, “Which of the following areas of board development have you applied to your employment or with the non-profit organization?” Respondents selected all applicable areas of board development. The total percentage did not equal 100.0% because of the participants’ multiple-choice responses. The first and second areas chosen most often by respondents were “Leadership and Management” (n=56, 66.7%) and “Board roles and responsibilities” (n=52, 61.9%), respectively. The

smallest number of respondents selected “Real estate management” (n=3, 3.6%). Respondents who selected “Other (Please specify)” (n=5, 5.9%) stated, “Not applicable/None” (n=3, 3.7%), “Not employed” (n=1, 1.1%), and “Quality Improvement” (n=1, 1.1%). All responses are shown in Table 13.

Table 13

Application of Board Development Areas by Board Member Respondents of Selected Non-profit Organizations in Louisiana As Measured by the Hollins Board Development Survey

Board Development Areas	n <sup>a</sup>	%
Leadership and Management	56	66.7
Board roles and responsibilities	52	61.9
Finances/Fundraising/Grant writing	42	50.0
Short- and Long-term planning	43	51.2
Facilitation of groups/meetings	34	40.5
Ethics/Laws affecting non-profit organizations	28	33.3
Board and Corporate evaluations	20	23.8
Corporate operations	16	19.0
Technical management	8	9.5
Other (Please specify)	5	5.9
Real estate management	3	3.6
Total		

<sup>a</sup>Respondents indicated all applicable board development areas. Thus, percentages did not total 100.0%.

<sup>b</sup>“Other (Please specify)”: “Not applicable/None” (n=3, 3.7%), “Not employed” (n=1, 1.1%), and “Quality Improvement” (n=1, 1.1%).

### **Presence of Board Job Descriptions**

Survey respondents were asked about board job descriptions; that is, “Do you have a job description for your board position?” The largest group of respondents replied, “Yes” (n=46, 54.8%), while the remainder replied “No” (n=38, 45.2%).

### **Annual Evaluation of Board Member Performance**

Survey respondents were asked, “Do you receive an annual evaluation of your board performance according to your job description?” The largest group of respondents replied, “No” (n=75, 89.3%), while the rest replied “Yes” (n=9, 10.7%).

### **Appointment to a For-profit Board**

Respondents were asked about for-profit board appointments, with the question, “Have you ever been appointed to a for-profit board?” Most respondents answered, “No” (n=69, 82.1%), while the remainder replied “Yes” (n=15, 17.9%).

### **Length of For-profit Appointment**

Associated with the inquiry of a for-profit appointment was the length of the appointment. Respondents were asked, “If ‘Yes’, how long was your appointment?” The largest group of respondents replied, “Less than 1 year” (n=45, 54.2%), mainly followed by other respondents who replied “1-5 years” (n=31, 37.3%), and “11-15 years” (n=3, 3.6%). Furthermore, a tie occurred between “6-10 years” (n=2, 2.4%) and “21 or more years” (n=2, 2.4%) for the fewest respondents.

### **Opportunities Related to Board Development**

Respondents were studied on the question, “Has your board development opened other opportunities for you?” Most respondents answered, “Yes” (n=52, 61.9%), while the remainder replied “No” (n=32, 38.1%).

### **Size of the Non-profit Organization**

The size of the non-profit organization was assessed by the question, “How large is the organization in which you are a non-profit board member?” Thirty-three respondents (39.3%) declared “Less than 10 employees” as the most frequent response, while 21 respondents (25.0%) selected “20-99 employees” as the second most frequent response. Also, six respondents (7.1%) selected “500 or more employees” as the least frequent response. All responses are displayed in Table 14.

Table 14

Size of the Non-profit Organization Served by Board Member Respondents of Selected Non-profit Organizations in Louisiana As Measured by the Hollins Board Development Survey

Size of Non-profit Organization	n	%
Less than 10 employees	33	39.3
10-19 employees	13	15.5
20-99 employees	21	25.0
100-499 employees	11	13.1
500 or more employees	6	7.1
Total	84	100.0

### **Size of the Non-profit Board**

The final characteristic under Objective one was the size of the non-profit board, which was assessed by the question, “How large is the non-profit board on which you serve?” Twenty-eight respondents (33.3%) declared “10-14 members” as the most frequent response (Table 15). Twenty-two respondents (26.2%) selected “20 or more members” as the second most frequent response. Finally, 14 respondents (16.7%) selected “15-19 members” as the least frequent response.



Table 15

Size of the Non-profit Board Served by Board Member Respondents of Selected Non-profit Organizations in Louisiana As Measured by the Hollins Board Development Survey

Size of Non-profit Board	n	%
1-4 members	0	0
5-9 members	20	23.8
10-14 members	28	33.3
15-19 members	14	16.7
20 or more members	22	26.2
Total	84	100.0

### Objective Three

The third objective of the study was to determine perceptions of board members of selected non-profit organizations in Louisiana on board development activities:

- a) Board roles and responsibilities
- b) Board evaluation
- c) Corporate evaluation
- d) Corporate operations
- e) Corporate sustainability
- f) Ethics
- g) Facilitation skills
- h) Financial management
- i) Fundraising
- j) Grant writing

- k) Laws affecting the non-profit organization
- l) Leadership skills
- m) Management skills
- n) Orientation
- o) Policy development
- p) Public/community relations
- q) Real estate management
- r) Relationship with corporate staff
- s) Short-term planning
- t) Long-term planning
- u) Technical management

Board members' perceptions were measured by the Hollins Board Development Survey. This objective was descriptive and was analyzed through means and standard deviations on summated scores.

Respondents were given a list of 33 board development activities and were asked to rate the degree to which their non-profit board or organization provided such activities, based upon a five-point anchored rating scale: 1 (never), 2 (rarely), 3 (sometimes), 4 (usually), and 5 (always). To assist in the explanation of responses, the researcher devised the following interpretive scale: 1.00 – 1.49 (never), 1.50 – 2.49 (rarely), 2.50 – 3.49 (sometimes), 3.50 – 4.49 (usually), and  $4.50 \geq$  (always).

In the analysis, the mean scores and standard deviations were determined for each item response to the Board Development Activities section of the survey. The item receiving the highest mean score from respondents was "I consider board development a priority" ( $M=4.40$ ,  $SD=0.771$ ), while the item receiving the second highest mean score was "My organization provides new board members with an orientation" ( $M=3.99$ ,  $SD=1.145$ ).

In contrast, the item with the lowest mean score from respondents was “The board provides development in real estate management” ( $M=2.13$ ,  $SD=1.082$ ). Similarly, the item with the second lowest mean score was “The board provides development in grant writing” ( $M=2.35$ ,  $SD=1.133$ ). Correspondingly, the Hollins Board Development Survey score (dependent variable) of the 33 items had a mean of 3.073, and a standard deviation of 0.936.

Generally, the response to 21 of the 33 items was within the “sometimes” range on the interpretive scale. Table 16 displays the mean scores and standard deviations for all items representing respondents’ views of board development activities.

Table 16  
Means and Standard Deviations of the Provision of Board Development Activities (BDA) for Board Members of Selected Non-Profit Organizations in Louisiana As Measured by the Hollins Board Development Survey

Item	<i>M</i>	<i>SD</i>	Category
BDA 8. I consider board development a priority.	4.40	0.771	Usually
BDA 2. My organization provides new board members with an orientation.	3.99	1.145	Usually
BDA 4. I participate in board development activities.	3.87	1.245	Usually
BDA 30. The board provides development in long-term (strategic) planning.	3.57	1.080	Usually
BDA 6. The organization considers board development a priority.	3.57	1.042	Usually
BDA 7. The board considers board development a priority.	3.57	1.016	Usually
BDA 12. The board provides development in general board roles and responsibilities.	3.56	1.043	Usually
BDA 29. The board provides development in short-term (annual) planning.	3.49	1.083	Sometimes

Table Continued

BDA 1. The organization provides board development activities for its board members.	3.48	1.018	Sometimes
BDA 26. The board provides development in public/community relations.	3.47	1.155	Sometimes
BDA 5. My fellow board members participate in board development activities.	3.47	0.977	Sometimes
BDA 20. The board provides development in fundraising.	3.37	1.228	Sometimes
BDA 19. The board provides development in financial management.	3.33	1.201	Sometimes
BDA 17. The board provides development in ethics.	3.29	1.271	Sometimes
BDA 16. The board provides development in corporate sustainability.	3.27	1.223	Sometimes
BDA 25. The board provides development in policy development.	3.25	1.187	Sometimes
BDA 32. The board members offer suggestions for board development activities.	3.25	1.067	Sometimes
BDA 9. The board provides regular board development activities.	3.20	1.053	Sometimes
BDA 23. The board provides development in leadership.	3.17	1.070	Sometimes
BDA 11. The organization provides fiscal resources for board development.	3.15	1.392	Sometimes
BDA 33. The board members apply information learned in development activities to corporate governance duties.	3.15	1.111	Sometimes
BDA 10. The organization provides human resources for board development.	3.08	1.249	Sometimes
BDA 24. The board provides development in management.	3.05	1.126	Sometimes
BDA 15. The board provides development in corporate operations.	3.03	1.262	Sometimes
BDA 22. The board provides development in laws affecting the non-profit organization.	3.00	1.185	Sometimes
BDA 14. The board provides development in corporate (organizational) evaluation.	2.93	1.155	Sometimes
BDA 28. The board provides development in relationship with the corporate staff.	2.92	1.239	Sometimes
BDA 18. The board provides development in facilitation skills.	2.91	1.199	Sometimes

Table Continued

BDA 13. The board provides development in board evaluation.	2.90	1.123	Sometimes
BDA 31. The board provides development in technical management.	2.76	1.089	Sometimes
BDA 3. The board conducts a needs assessment to determine needs of its members.	2.71	1.250	Sometimes
BDA 21. The board provides development in grant writing.	2.35	1.133	Rarely
BDA 27. The board provides development in real estate management.	2.13	1.082	Rarely

*Note.* N= 84

<sup>a</sup> Response scale: 1 (never), 2 (rarely), 3 (sometimes), 4 (usually), and 5 (always).

<sup>b</sup> Interpretive scale: 1.00 – 1.49 (never), 1.50 – 2.49 (rarely), 2.50 – 3.49 (sometimes), 3.50 – 4.49 (usually), and 4.50 ≥ (always).

#### **Objective Four**

The fourth objective of the study was to determine if a relationship exists between the size of the non-profit board and the presence of board development activities. Board members' perceptions were measured by the Hollins Board Development Survey. This objective was through ANOVA (analysis of variance), which is used to reveal the main effects of categorical independent variables on an interval dependent variable. A comparison of board members' responses on the size of the non-profit board was performed (Table 17). The highest mean score was "20 or more members" (n=22, M=3.66, SD=.740).

Table 17  
Frequencies, Means, and Standard Deviations of Board Size of Non-profit Board Members As Measured by the Hollins Board Development Survey

Number of Board Members	n	<i>M</i>	SD
1-4 members	0	0.00	0.00
5-9 members	20	2.40	.830
10-14 members	28	3.05	.959

Table Continued

15-19 members	14	3.16	.699
20 or more members	22	3.66	.740
Total	84	3.07	.936

The Levene's Test of Homogeneity of Variances showed equal variances between the groups ( $F=.521, p=.669$ ). The differences between the groups were not statistically significant. Table 18 demonstrates the ANOVA results for the differences in the size of non-profit boards.

Table 18

Analysis of Variance Demonstrating Differences among Sizes of the Non-profit Boards  
As Measured by the Hollins Board Development Survey

	df	SS	MS	F <sup>a</sup>	P <sup>b</sup>
Between groups	3	16.970	5.657	8.116	<.001
Within groups	80	55.756	.0697		
Total	83	72.726			

<sup>a</sup>One-Way Analysis of Variance

<sup>b</sup>.05 Alpha Level for the Two-tailed Test of Significance

There was a significant amount of variance on board size at the  $p<.05$  level for the five groups. Post hoc comparisons using the Tukey HSD test indicated that the mean score for "20 or more members" ( $M = 3.66, 95\% \text{ CI } [3.3346, 3.9904]$ ) was statistically different than "5-9 members" ( $M = 2.40, 95\% \text{ CI } [2.0068, 2.7834]$ ). Also, the "10-14 members" ( $M=3.05, 95\% \text{ CI } [2.6770, 3.4209]$ ) and the "15-19 members" ( $M=3.16, 95\% \text{ CI } [2.7606, 3.5674]$ ) differed slightly from the "5-9 members" and "20 or more members." These results suggest that the larger boards of directors are more likely to have board development activities.

## Objective Five

The final objective was to determine if a model exists explaining a significant portion of the variance in the Hollins Board Development Survey score of board members of selected non-profit organizations in Louisiana on selected demographic characteristics. The 11 characteristics (i. e., independent variables) included “Gender”, “Race”, “Age of board member”, “Highest educational level”, “Primary occupational area”, “Length of board service”, “Number of non-profit boards served on”, “Reasons for appointment to non-profit board”, “Roles served as a non-profit board member”, “Size of the non-profit organization”, and “Size of the non-profit board.” The Hollins’ Board Development Survey score was used as the dependent variable in the regression equation.

The variable “Age of non-profit board member” was entered in the regression equation as an interval variable (Table 19). As for the categorical independent variables, dummy coding was performed. For several categorical independent variables, their levels were consolidated to create new categories. The variable “Race” was consolidated from seven to two categories, “White” and “Non-white”. The variable “Highest educational level” was consolidated from nine to two categories, “Bachelor’s degree” and “Graduate degree”. Likewise, “Size of the non-profit board” was consolidated from five to four categories, “5-9 members”, “10-14 members”, “15-19 members”, and “20 or more members”. The remaining independent variables, “Length of board service”, “Number of non-profit boards served on”, “Primary occupational area”, “Roles served as a non-profit board member”, and “Size of the non-profit organization” were not included in the regression analysis because of their low correlation to the Hollins’ Board Development Survey score.

An independent-samples t-test was conducted to compare the Hollins Board Development Survey score for “Race” (recoded), “Highest educational level” (recoded), and “Gender.” There were no significant difference in scores for “Whites” ( $M=3.24$ ,  $SD=1.13$ ) and “Non-Whites” ( $M=3.01$ ,  $SD=0.85$ );

$t(82) = .982, p = .329$  (two-tailed); mean difference = .225, 95% CI = -.23179 to .68068. Regarding “Highest educational level”, there were no significant difference in scores for “Master’s Degree” ( $M = 3.05, SD = .965$ ) and “Bachelor’s Degree” ( $M = 3.05, SD = .881$ );  $t(81) = -.012, p = .991$  (two-tailed); mean difference = -.002, 95% CI = -.42145 to -.41650. Likewise, there were no significant difference in scores for females ( $M = 2.97, SD = 1.05$ ) and males ( $M = 3.23, SD = .726$ );  $t(82) = 1.201, p = .233$  (two-tailed); mean difference = .250, 95% CI = .16445 to .66537. The scores of these independent variables were non-significant when compared with the Hollins’ Board Development Survey score. Hence, “Race” (recoded), “Highest educational level” (recoded), and “Gender” were not included in the regression equation.

In addition, a histogram depicting the Regression Standard Residual for the dependent variable, Hollins Board Development Survey score showed a normal curve (Figure 3); thus, normality was assumed. A scatterplot of standardized residuals charted against the Hollins Board Development Survey score displayed homoscedasticity, as values congregated on or near the regression line.

Table 19  
Relationships among the Independent Variables and the Dependent Variable, Hollins Board Development Survey Score on Board Members of Selected Non-profit Organizations in Louisiana

Variable	$r^a$	$p^b$
Question 51: What is your age at your last birthday? (Fill in the blank)	.293	.003
5-9 board members	-.407	<.001
10-14 board members	-.018	.434
15-19 board members	.044	.347

<sup>a</sup>Pearson Product Moment Correlation

<sup>b</sup>.05 Alpha Level for the Two-tailed Test of Significance



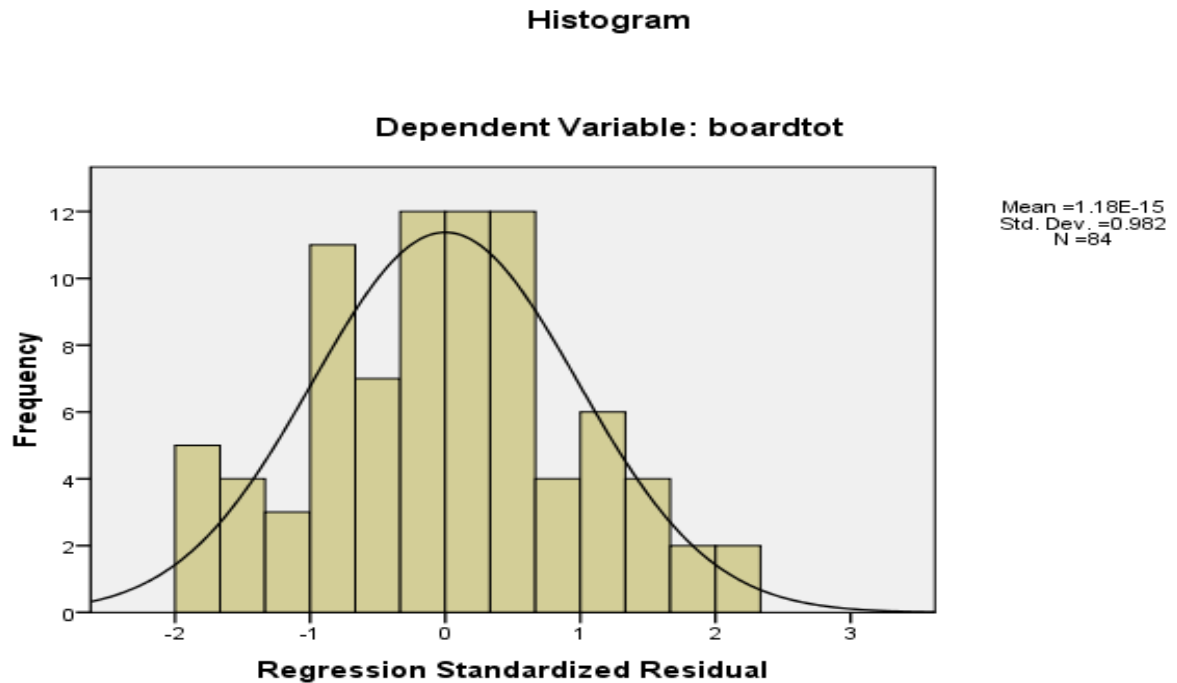


Figure 3: Histogram of Standardized Residuals for the Dependent Variable Hollins Board Development Survey Score

Pearson Product Moment Correlation at the two-tailed, alpha .05 level was used to compute bivariate correlations. The correlations were examined for their degree of association with the Hollins Board Development Survey score, using Davis' (1971) set of descriptors: .01- .09 (negligible), .10 - .29 (low), .30 - .49 (moderate), .50 - .69 (substantial), .70 - .99 (very high), and 1.0 (perfect). For each categorical variable, the levels of variables were eliminated because of their low correlations with the dependent variable.

Remaining independent variables were placed stepwise into the regression equation, with the Hollins Board Development Survey score as the dependent variable. Inspections of the Variance Inflation Factor (VIF) and tolerance values revealed no collinearity problems. Similarly, a view of the correlation matrix revealed no high correlations. Three variables explained 25.6% ( $R^2=.256$ ) of the variance of the

board development score. Notably, the regression equation with the three independent variables predicted board development ( $F_{3, 80}=9.157$ ,  $P= <.001$ ). These variables greatly contributed to the model, “Size of the non-profit board, “5-9 members” and “10-14 members”, and “Age of non-profit board member”. Table 20 demonstrates the ANOVA and model summary results for the regression equation using three independent variables in predicting the board development score and the model summary. Furthermore, 25.6% of the board development score variance consisted of 16.6% (“Size of the non-profit board - “5-9 members”), 5.2% (“Age of non-profit board member”), and 3.8% (“Size of the non-profit board - “10-14 members”) (Table 21).

Table 20

Significance of the Regression Equation and Model Summary Using Three Independent Variables in Predicting Responses of Board Members of Selected Non-profit Organizations in Louisiana As Measured by the Hollins Board Development Survey

ANOVA

Model	SS	df	MS	F	P
Regression	18.590	3	6.197	9.157	<.001
Residual	54.136	80	0.677		
Total	72.726	83			

Model Summary

Model	R	R <sup>2</sup>	R <sup>2</sup> (Adjusted)	R2 (Change)	F (Change)	df1	df2	Sig F (Change)
	.506	.256	.228	.038	4.046	1	80	<.001

One-Way Analysis of Variance

.05 Alpha Level for the Two-tailed Test of Significance

<sup>a</sup>Predictors: (Constant), “5-9 members”; Question 51: “What is your age at your last birthday? (Fill in the blank.)”, and “10-14 members”.

<sup>b</sup>Dependent Variable: Hollins Board Development Survey score

Table 21

Model Summary of Independent Variables Retained in the Regression Equation  
Predicting the Hollins Board Development Survey Score

Model Summary Change Statistics						
Model	R <sup>2</sup> (Change)	F (Change)	df1	df2	Sig F (Change)	Durbin-Watson
1	.166	16.316	1	82	<.001	
2	.052	5.388	1	81	.023	
3	.038	4.046	1	80	.048	1.870

The coefficient values, t-values, and related significance levels for the independent variables retained in the regression equation predicting the Hollins Board Development Survey score are in Table 22. First, the Beta standardized coefficients for “Size of the non-profit board - “5-9 members” and “10-14 members” were -.452 and -.211, respectively, with “5-9 members” being the most significant. Both values were negatively correlated to the dependent variable; therefore, these board sizes had lower survey scores than the “20 or more members.” Second, the Beta standardized coefficient for “Age of non-profit board member” was .230, with a positive correlation to the Hollins Board Development Survey score; that is, the survey score increased as the board member’s age increased.

Lastly, the independent variables, “Highest educational level – Bachelor’s Degree”, “Length of board service”, “Primary occupational area”, “Roles served as a non-profit board member”, “Number of non-profit boards served on”, “Size of the non-profit organization” , and “Size of the non-profit board – 10-14 members” were not entered into the regression equation because their t-test values were not significant.

Table 22

Coefficient Values, Standard Errors, Standardized Coefficient Values, t Values, and Significance Levels for Independent Variables Retained in the Regression Equation Predicting the Hollins Board Development Survey Score

Model	Unstandardized Coefficients		Standardized Coefficients			Collinearity Statistics	
	$\beta$	Standard Error	Beta	t	Sig.	Tolerance	VIF
Constant	2.486	.440		5.655	<.000		
Number of Board Members (5-9)	-.988	.232	-.452	-4.255	<.000	.823	1.215
Question 51: What is your age at your last birthday? (Fill in the blank.)	.019	.008	.230	2.353	.021	.972	1.029
Number of Board Members (10-14)	-.417	.207	-.211	-2.011	.048	.844	1.185

<sup>a</sup>Dependent Variable: Hollins Board Development Survey score

## **CHAPTER 5**

### **SUMMARY, CONCLUSIONS, AND RECOMMENDATIONS**

#### **Purpose of Study**

The primary purpose of this investigation was to determine the perceptions of board members of selected non-profit organizations in Louisiana regarding board development (see Chapter 1). Additionally, this investigation described board members on selected demographic characteristics.

#### **Methodology of Study**

The Hollins Board Development Survey was administered through an online survey system (Zoomerang™) to board members of 267 non-profit organizations. Chief Executive Officers and/or board chairs were asked by the researcher to forward the survey link to at least five board members (i.e., 1,335 subjects). A total of 110 board members responded to the survey, for a final response rate of 8.2%. However, 84 of the respondents provided usable data (6.0%). The 26 respondents who provided unusable data were dropped from the study. Follow-up of non-respondents was not possible because the researcher did not have board members' e-mail addresses.

This chapter encompasses the summary and conclusions of board members' perceptions on board development. The summary and conclusions correspond to research objectives one through five. To address the research purpose, the following objectives were devised to steer the study.

#### **Objective 1**

Describe board members of selected non-profit organizations in Louisiana on the following selected demographic characteristics:

- a) Gender
- b) Race
- c) Highest educational level

- d) Age of board member
- e) Primary occupational area

## **Objective 2**

Describe board members of selected non-profit organizations in Louisiana on areas related to their board appointment experience:

- a) Reasons for non-profit board appointment
- b) Length of time as a non-profit board member
- c) Number of non-profit board appointments
- d) Roles served as a non-profit board member
- e) Specific areas of board development offerings
- f) Preferred learning delivery methods for board development activities
- g) Areas of board development applied to employment or non-profit organization
- h) Presence of board job descriptions
- i) Annual evaluation of board member performance
- j) Appointment to a for-profit board
- k) Length of for-profit board appointment
- l) Opportunities related to board development
- m) Size of the non-profit organization
- n) Size of the non-profit board

## **Objective 3**

Determine perceptions of board members of selected non-profit organizations in Louisiana on board development activities:

- a) Board roles and responsibilities

- b) Board evaluation
- c) Corporate evaluation
- d) Corporate operations
- e) Corporate sustainability
- f) Ethics
- g) Facilitation skills
- h) Financial management
- i) Fundraising
- j) Grant writing
- k) Laws affecting the non-profit organization
- l) Leadership skills
- m) Management skills
- n) Orientation
- o) Policy development
- p) Public/community relations
- q) Real estate management
- r) Relationship with corporate staff
- s) Short-term planning
- t) Long-term planning
- u) Technical management

#### **Objective 4**

Determine if a relationship exists between the size of the non-profit board and the presence of board development activities.

## **Objective 5**

Determine if a model exists explaining a significant portion of the variance in the Hollins' Board Development Survey scores of board members of selected non-profit organizations in Louisiana on selected demographic measures:

- a) Age of board member
- b) Size of the non-profit board

## **Summary of Major Findings**

### **Objective 1**

The largest group of respondents were female (n=51, 61.0%), while 33 respondents were male (39.0%). The largest number of respondents was "White" (n=61, 73.0%), with the second largest number being "Black" (n=20, 24.0%). Additionally, the first and second largest numbers of respondents possessed a "Master's Degree" (n=31, 37.0%) and a "Bachelor's Degree" (n=27, 32.0%), respectively. The largest number of respondents were between 50-59 years (n=34, 41.0%), while the second largest number of respondents were between 40-49 years (n=17, 20.0%). The first and second categories chosen most often by respondents regarding primary work area were "Other (Please specify)" (n=23, 27.4%) and "Health Care" (n=18, 21.4%).

### **Objective 2**

The reasons for non-profit board appointment that were chosen most often by respondents were "Contacts/Network" (n=47, 56.0%) and "Advocacy expertise" (n=43, 51.2%). The first and second categories chosen most often by respondents for length of time as a non-profit board member were "1-5 years" (n=43, 49.4%) and "6-10 years" (n=19, 21.8%). They also indicated "1-3" boards (n=46, 52.9%) and "4-6" boards (n=24, 27.6%), as their most frequent responses to the number of non-profit boards



served. The role selected most frequently was “Board Member” (n=81, 96.4%). The next most frequent role was “Board Committee Chair” (n=53, 63.1%).

The first and second areas chosen for areas of board development offerings were “Short- and long-term planning” (n=52, 61.9%) and “Board roles and responsibilities” (n=49, 58.3%), respectively. The methods selected most often by respondents for preferred learning delivery methods were “Conference/Seminar” (n=52, 61.9%) and “Group (Small/Large)” (n=50, 59.5%), respectively. As for application of board development areas, the first and second areas chosen most often by respondents were “Leadership and management” (n=56, 66.7%) and “Board roles and responsibilities” (n=54, 64.2%), correspondingly.

The largest group of respondents replied, “Yes” (n=47, 54.7%) to receiving board job descriptions, while the remainder replied “No” (n=39, 45.3%). In contrast, the majority of respondents replied, “No” (n=77, 89.5%) to receiving an annual board performance evaluation, while the remaining replied “Yes” (n=9, 10.5%). Most respondents answered, “Yes” (n=52, 60.5%), while the remaining replied “No” (n=34, 39.5%) to opportunities related to board development. Regarding appointment to for-profit board, the majority of respondents answered, “No” (n=71, 82.6%), while the remaining replied “Yes” (n=15, 17.4%).

Regarding length of for-profit appointment, the largest group of respondents replied, “Less than 1 year” (n=45, 54.2%), followed by other respondents who replied “1-5 years” (n=31, 37.3%). Thirty-three respondents (39.3%) and 21 respondents (25.0%) declared “Less than 10 employees” and “20-99 employees”, respectively as the first and second most frequent responses to the size of the non-profit organization. Finally, for the size of the non-profit board, twenty-eight respondents (33.3%) declared “10-14 members” as the most frequent response, with 22 respondents (26.2%) selecting “20 or more members” as the second most frequent response.

### **Objective 3**

Board members' perceptions, as measured by the Hollins Board Development Survey, were analyzed through means and standard deviations on summated scores. Respondents were given a list of board development activities and were asked to rate the degree to which their non-profit board or organization provided such activities, based upon a five-point anchored rating scale: 1 (never), 2 (rarely), 3 (sometimes), 4 (usually), and 5 (always). The researcher devised the following interpretive scale to aid in response analysis: 1.00 – 1.49 (never), 1.50 – 2.49 (rarely), 2.50 – 3.49 (sometimes), 3.50 – 4.49 (usually), and  $4.50 \geq$  (always).

In sum, the mean scores and standard deviations were determined for each item response to the Board Development Activities section of the survey. The item receiving the highest frequency level from respondents was "My organization provides new board members with an orientation" ( $M=4.02$ ,  $SD=1.139$ ). The item receiving the second highest frequency level from respondents was "The board provides development in long-term (strategic) planning" ( $M=3.59$ ,  $SD=1.105$ ). The responses to most of the 33 items were within the "sometimes" range on the interpretive scale.

### **Objective 4**

Board members' perceptions were measured by the Hollins Board Development Survey. This objective was examined through ANOVA (analysis of variance), which was used to reveal the main effects of categorical independent variables or factors on an interval dependent variable. A comparison of board members' responses on the size of the non-profit board was performed. The highest mean score was of "20 or more members" ( $n=22$ ,  $M=3.66$ ,  $SD=.740$ ). The second highest mean score was for "15-19 members" ( $n=14$ ,  $M=3.16$ ,  $SD=.699$ ).

The Levene's Test of Homogeneity of Variances showed equal variances between the groups ( $F=.521$ ,  $p=.669$ ). The differences between the groups were not statistically significant. However, post

hoc comparisons using the Tukey HSD test revealed a significant amount of variance on non-profit board size at the  $p < .05$  level for the four groups. The mean score for “20 or more members” ( $M = 3.66$ , 95% CI [3.3346, 3.9904]) was significantly different than “5-9 members” ( $M = 2.40$ , 95% CI [2.0068, 2.7834]). Also, the “10-14 members” ( $M = 3.05$ , 95% CI [2.6770, 3.4209]) and the “15-19 members” ( $M = 3.16$ , 95% CI [2.7606, 3.5674]) differed slightly from the “5-9 members” and “20 or more members.” These results suggest that the larger boards of directors are more likely to have board development activities.

### **Objective 5**

Lastly, three independent variables explained 25.6% ( $R = .256$ ) of the variance of the Hollins Board Development Survey score. In particular, the regression equation with the variables, “Size of the non-profit board, 5-9 members”, “Age of the non-profit board member”, and “Size of the non-profit board, 10-14 members” predicted board development ( $F_{3, 80} = 9.157$ ,  $p < .001$ ). These variables significantly contributed to the regression model on selected demographic variables. Board member size was negatively correlated with board development.

## **Conclusions and Recommendations**

### **Conclusion 1**

The largest group of respondents in this study were female, White, 50-59 years of age, and possessed a Bachelor’s degree or higher. They worked in health care and other occupations, such as arts, law, non-profit management/consulting, and social services.

The researcher recommends that non-profit organizations increase the appointment of individuals to their boards who reflect the diversity of the population they serve. This diversity should include age, gender, race, educational level, etc. Arfken, Bellar, & Helms (2004, p. 178) maintain, “Diversity in gender, age, ethnicity, and viewpoint offers corporations a number of benefits including additional

knowledge, fresh ideas and insights to aid problem-solving, better product positioning, enhanced strategic planning, new knowledge or opinions, and even additional accountability.”

Age diversity on non-profit boards is important, especially as most consist of mostly middle-aged and elderly persons (Baby Boomers’ and Veterans’ generations). It is essential that boards recruit younger persons (Xers’ and Millenials’ generations) with different experiences and backgrounds. Porter-O’Grady and Malloch (2003, p. 233) describe the resistance to increased diversity within organizations:

Many have also been reluctant to actively seek diverse perspectives by including representatives from all gender and age groups in essential work teams. Instead, stereotypical executives – male and middle-aged – continue to develop strategic, human resource, and budgetary plans.

Similarly, gender diversity is a critical aspect of corporate governance. Most respondents of this study were female, which contrasts starkly with numerous studies showing that most boards are predominantly male, though females comprise nearly half of the U. S. workforce (Board Source, 2007; Eagly & Carly, 2007; Helms, Arfken, & Bellar, 2008; Stephenson, 2004; U. S. Department of Labor, Women’s Bureau, 2009). Why is this inequity so prevalent? Helms, Arfken, and Bellar (2008) present three reasons for this inequity; they include 1) omission of women from informal networks, 2) inhospitable organizational cultures, and 3) “glass ceiling” issues. A “glass ceiling” refers to an invisible barrier that attempts to establish the level to which a woman can ascend in a company (Eagly & Carly, 2007). Moreover, Eagly and Carly (2007) declare that the numerous hurdles placed in the paths of women progressing to boards and senior administrative positions are like a labyrinth instead of a glass ceiling.

Organizations that appoint women to board positions obtain many benefits. Some of these include

- The ability of organizations with women board members to attract more female talent and demonstrate the importance of diversity to others (Stephenson, 2004).

- The ability of women board members to encourage communication among board members and between board and administration through their collaborative approach to leadership (Konrad & Kramer, 2006).
- The likelihood of women board members being transformational leaders and promoting participation in power and information, thereby augmenting the employees' status (Pollitt, 2005).

Next, ethnic diversity on boards is also essential, particularly as minority ethnic groups are often underrepresented on non-profit boards. The respondents of this study were mostly White; this is similar to findings of other studies. For example, Board Source (2007) in its study of non-profit organizations found that minorities comprise 14.0% of non-profit board members in the U. S. Most of them were “Black/African-American” (7.0%), “Hispanic/Latino” (3.0%), “Asian” (2.0%), and “Other” (2.0% - American Indian/Native Alaskan, Native Hawaiian/Other Pacific Islander). Similarly, the Alliance for Board Diversity (2008) revealed that only 17.0% of Fortune 100 board members were minority ethnic groups and women. Ethnic diversity on boards is beneficial in many ways, including improved strategic and competitive impact in the global economy, continued economic sustainability, and better financial performance (Alliance for Board Diversity, 2008).

Further research on board diversity is recommended, especially in better assessing and addressing diversity needs. Another prime area for emphasis in diversity education includes the management of multiple generations (i.e., Veterans, Baby Boomers, X-ers, and Millennials) in the workplace. Understanding the generations' similarities and differences, values, work ethics, etc., are crucial to devising and implementing strategies for creating and sustaining effective work teams (Hamill, 2005). When designing board development activities on diversity, it is necessary to include three main aspects of intercultural communication, according to Brislin and Yoshida (1994, p. 24):

Awareness, knowledge, and information about culture, cultural differences, and the specific culture...Attitudes related to intercultural communication (e.g., tolerance, prejudice, or active enthusiasm about developing close relationships) and the emotional confrontation people experience when dealing with cultural differences in their everyday communication...Skills or new behaviors that will increase the chances of effective communication when working with people of other cultural backgrounds.

To sum, board development activities on diversity and related issues demonstrate board and organizational accountability.

## **Conclusion 2**

The importance of studying board appointment experience allows a board to create and promote a board development program that is suitable for its members' needs, interests, skill sets, etc., while incorporating such features as accountability (participants and board developer), action plans, discovery of board members' assets and vulnerabilities, and performance metrics. This study found that board members served one to five years as a board member; served on one to three boards; served a non-profit organization of less than 10 employees; tended to always participate in board development activities; were appointed for board service because of their contacts/network and advocacy expertise; and had not served on a for-profit board. Moreover, they served in the roles of board member and board committee chair.

The researcher recommends the appointment of individuals with expertise in multiple areas for board service (Kelderman, 2008). Experienced board members can assist the board in mentoring new and/or inexperienced members, while new members can offer fresh perspectives in handling board matters. It is recommended that boards use the board members' expertise to benefit the organization, particularly in contacts/networks, and advocacy. For instance, a board member of an elderly care organization possesses advocacy expertise, then the board should use that member to develop advocacy

skills in other members (e.g., speaking with state and national lawmakers about proposed legislation affecting the elderly). Furthermore, boards should use their members' contacts and networks to help fulfill their organizations' mission and vision (e.g., participating in fundraising drives, serving on ad hoc committees, serving as a future board member). This promotes one of the primary board roles, that of a liaison between the organization and the public.

In addition, a board may include term limits as part of its board development program, particularly as it should be outlined in the non-profit organization's bylaws. Benefits of this are 1) a continuous current of new contacts and ideas; 2) improved opportunities for building board diversity; 3) increased opportunities for individuals in the community to serve on boards; 4) the advancement of high board commitment, accountability, and productivity; and 5) the ability to remove unproductive or uncooperative board members (Board Source, 2010; Connolly, 2003). The inclusion of term limits to a board development program should be

Boards, senior administrators, human resource educators, board educators, and others who provide board development activities should offer small and large group activities, and send board members to conferences and seminars. Such activities foster board cohesiveness; provide evidence for a board member's removal or retention; promotes exchange of ideas (including best practices, insights, etc.); and supports networking with board members of other organizations (Connolly, 2003; Joseph, 1995).

Increased emphasis should be given to board members receiving board job descriptions and annual performance evaluations. This information is critical for improved board member, board, and organizational accountability and performance (Carver, 2006; Elks, 2004; Smith et al., 2000; U. S. Department of Agriculture, Rural Business Cooperative Service, 2000). Correspondingly, pertinent information obtained from performance evaluations – particularly areas for improvement - provides additional material for rich educational sessions for board members (Long, 2006). Also, improved board

development activities will lead to increasing opportunities (e.g., jobs, other board and committee positions, speaking engagements) for board members as they acquire new knowledge, skills, and attitudes, and update current skills and abilities. More in-depth research is needed on board assessment and evaluation, addressing not only knowledge, skills, and attitudes, but motivation for board service (e.g., desire to help others, enhanced relationships, improving self-worth, compensation) (Farris, McKinley, Ayres, Peters, & Brady, 2009; Inglis & Cleave, 2006).

### **Conclusion 3**

Most respondents noted that their organizations provide new board members with orientation, and offer board development in long-term (strategic) planning. However, it is unclear if board members receive continuous board development, particularly on a variety of topics. Based on the findings of this study, very few respondents received board development on real estate management. Board development in this area should be encouraged, since many non-profit organizations lease or own buildings and properties, address space utilization, and seek to acquire properties for organizational expansion. Education in this area is appropriate as organizations desiring expansion of operations acquire real estate holdings as 1) a buffer against constant economic flux, and 2) an additional revenue source (e.g., leasing office space, sharing office space or facilities). It is also helpful to understand real estate management, particularly with the real estate sector recession associated with the global economic recession.

Similarly, few respondents received board development in grant writing. Many non-profit organizations rely on grants as a critical funding source for company operations and capacity building. It is beneficial for board members to be familiar with grants, including the purposes, benefits, and types of grants; eligibility for grants; process of writing grants; and methods of securing, sustaining, and increasing grants.



Of the 21 areas of Board Development, why were real estate management and grant writing rated the lowest by respondents, in spite of their critical positions in non-profit organizations? First, it is probable that board members and senior administrators view real estate management and grant writing as the senior administrators' and/or staff's responsibility. Bristol (2010, EzineArticles.com, ¶7) states, "The staff is best suited to pursuing grant opportunities and earned income; let them do it. The board, on the other hand, is best suited for raising money from individual philanthropy (individual donations of any size) and from corporations." Second, it is possible that board members lack knowledge of these areas. Consequently, they avoid addressing real estate management and grant writing matters. Third, board members may not fully realize how real estate holdings and grant funding directly affect the financial viability of the organization – short-term and long-term. In turn, the degree of financial viability affects the image of the organization to its internal and external stakeholders.

The researcher recommends deliberate, continuous board development for new and experienced board members. Board development should be based upon such criteria as 1) board needs assessment (formal and informal); 2) board member feedback; 3) new findings from research, practice, and education; 4) recommendations from board members and senior administrative staff; 5) federal, state, and municipal laws and guidelines; 6) best practices in the non-profit sector and related arenas; 7) professional groups (e.g., national and state non-profit associations, Board Source, American Society for Training and Development, groups related to the organization's mission); and 8) emerging global issues and events. Also, continuous board development would decrease the learning curve for new members, and foster reliable performance.

#### **Conclusion 4**

The study demonstrated a relationship between the size of the non-profit board and the presence of board development activities. The response receiving the highest rating was "20 or more [board]

members”. The study also revealed that the larger the board, the more likely the board provided board development activities. Notably, the presence of board development activities increases as board size increases. Why is this so?

One possible reason is that larger boards may emphasize board development as an integral need in their organizations, thereby enabling the boards to more effectively manage their organizations. A second reason may be that larger boards have more individuals with which to share board development responsibilities. Third, it is possible that larger boards may have access to human, financial, and other resources for board development that smaller boards may not have. Therefore, the researcher recommends replication of this study with a larger number of board members, and with more states or provinces (i.e., nationwide). Additionally, the study should be replicated with the age of the organization as a possible factor affecting the presence of board development.

## **Conclusion 5**

The age of board members and the size of the non-profit board (i.e., 5-9 and 10-14 board members) were associated with the presence of board development activities. There are some possible reasons for this. First, older board members, because of their years of expertise and life experiences, may better appreciate the benefits of board development, particularly as it improves board member, board, and organizational performance; and advances lifelong learning (Knowles et al., 2005). Second, board size is determined by state laws, in addition to the board’s mission, developmental stage, fundraising needs, and locality (i.e., national or local) (Board Source, 2010). It is important that boards have enough members to properly oversee the organization, without having too many that it makes board policy and decision making difficult. This is supported by Cheng (2008), in his study on corporate boards, who found that it takes longer for larger boards to reach consensus on board decisions.

As previously noted, of 1,335 subjects, 110 board members responded to the survey, for a response rate of 8.2%, although only 84 respondents provided usable data. Why was the response rate from board members so low, when the initial response from CEOs and/or board chairs for survey participation was positive? First, it is possible that some CEOs and/or board chairs did not forward the researcher's survey communications with the survey weblink to their board members. If this did occur, could it be that CEOs and/or board chairs were concerned about the views of board members, particularly if some views were not favorable? This is a concern for future researchers, especially if boards see CEOs and/or senior administrators as the primary providers of board development activities. Conversely, most board members may have received the survey but chose not to complete it. It is possible that the subjects felt uncomfortable in completing the survey, because they are offered board development programs, but choose not to participate in them.

Second, it is possible that some CEOs and/or board chairs were too busy to forward the survey information to their board members, or felt the survey would be an additional constraint on board members' time. Similarly, board members who received the survey but did not complete it, may have felt that they were too busy, or that the survey was not a priority for them. Third, the board governing models used by the organizations may have affected the board members' level of survey participation. These models (i.e., Advisory Board, Cooperative, Management Team, Parton, and Policy Board) differ in focus of board roles and responsibilities, and relationships between board and staff (Garber, 1997). They are further influenced by the history, purpose, and size of the organization (Bradshaw, 2007; Garber, 1997; Retz, 2004). For instance, if a non-profit board functions as the Patron Model or Advisory Board Model, then its board members will emphasize fundraising and/public relations, but not governance tasks, which relates heavily on board member accountability.

Most importantly, the researcher did not have e-mail addresses of board members to follow up with non-respondents. Though they agreed to forward survey communications to their board members, nearly all CEOs and/or board chairs expressed discomfort in providing the researcher with this crucial information. They expressed concerns of privacy and/or protection of contact information, despite the researcher's frequent assurances of confidentiality.

McDonagh (2006) obtained similar findings in her study of health care board members throughout the U. S. Four hundred eighty-six CEOs and/or their designees were the primary contact persons. The final response rate of her study was 13.0%, with 151 respondents. She noted that the initial response from CEOs was positive; however, obtaining consent or agreement from them to allow their boards to participate in the study proved difficult. Furthermore, she discovered that 68.0% of the CEOs that completed the Board Self-Assessment Questionnaire (BSAQ) did not allow board members access to the web-based survey. McDonagh posited the following reasons for the CEOs hesitation: 1) Protectiveness of their boards; 2) concerns about some detailed and sensitive questions that board members needed to answer about their own board performance; and 3) concerns for board members' time commitments. Siciliano (2008) in her study comparing CEO and board members perceptions of board involvement in strategy also found that board members wanted administrators to oversee time-consuming activities.

Similarly, Karanja (n. d., p. 3702) noted that many Management Information Systems (MIS) studies had low response rates despite previous contact with subjects prior to data collection. He added that studies show that it is particularly difficult to obtain data from executives.

In many MIS survey-based research studies, the response rate is usually below 20% and this is amplified by the fact that pre-contacts prior to data collection still results in low response rate. Additionally, researchers have even specifically stated that certain segments

of the MIS research field are difficult to collect data from such as organizational chief executives, and other senior officials.

Regarding this study on board development in non-profit organizations in Louisiana, many respondents had occupations in the health care domain. According to the U. S. Department of Health and Human Services, Health Resources and Services Administration, National Center for Health Workforce Analysis (2000), there were approximately 200,000 people employed in Louisiana's health sector, comprising 10.7% of Louisiana's total workforce. This surpassed the U. S. rate of 8.8%, and mirrored Louisiana's rank of 18 among states in per capita health services employment. The health care domain is among the largest in the U. S., and is heavily affected by frequently changing laws, policies, uncertain outcomes, consumers, and providers. Board members working with or employed by non-profit health care organizations should be engaged in board development programs. In her study of health care boards throughout the U. S., McDonagh (2006) discovered that board members scored the lowest on the education dimension on the BSAQ competencies; this dimension was lower than the other five competencies. She proposed that these findings may indicate a need for a continuous focus on board education in the health care domain. Thus, the board development study should be replicated in Louisiana and the United States with boards of health care organizations.

The researcher advocates replication of this study, using a mixed-method design of quantitative and qualitative methods, and having all members of selected boards complete the survey. This would improve 1) sample size, 2) allow respondents to present ideas of importance to them about board development, and 3) permit the researcher to delve into the cognitive and affective aspects of board development (Ary et al., 2006, Corbin & Strauss, 2008).

Furthermore, the researcher suggests repeating this study, obtaining board members' and CEOs' views on board development. One could compare and contrast their responses, discover strengths and

deficiencies related to board development programs, and devise solutions for cultivating their programs and strengthening their organizations. Such research would also confirm the importance of the board-CEO relationship (Eadie, 2005; Greenleaf, 1977; U. S. Department of Health and Human Services, Health Resources and Services Administration, Bureau of Primary Health Care, 2000).

The importance of this study was to ascertain non-profit board members' perceptions toward board development needs. In addressing board members' needs, non-profit boards become more effective in managing their organizations. Effective boards provide the bases for the mission and vision of their organizations, and create policies that enable administrators, staff, and volunteers in fulfilling the mission and vision.

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## APPENDIX A

### HOLLINS BOARD DEVELOPMENT SURVEY



#### Hollins' Board Development Survey (1)

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#### Hollins' Board Development Survey



Page 1 - Heading

#### PART ONE - BOARD DEVELOPMENT ACTIVITIES

Directions: Please provide your candid response to each statement by selecting the appropriate response according to the scale noted below. Thank you for your cooperation.

- 1 - Never
- 2 - Rarely
- 3 - Sometimes
- 4 - Usually
- 5 - Always

Page 1 - Question 1 - Rating Scale - One Answer (Horizontal)

[Mandatory]

The organization provides board development activities for its board members.

Never  
☐

Rarely  
☐

Sometimes  
☐

Usually  
☐

Always  
☐

Page 2 - Question 2 - Rating Scale - One Answer (Horizontal)

[Mandatory]

My organization provides new board members with an orientation.

Never  
☐

Rarely  
☐

Sometimes  
☐

Usually  
☐

Always  
☐

Page 2 - Question 3 - Rating Scale - One Answer (Horizontal)

[Mandatory]

The board conducts a needs assessment to determine development needs of its members.

Never  
☐

Rarely  
☐

Sometimes  
☐

Usually  
☐

Always  
☐

Page 2 - Question 4 - Rating Scale - One Answer (Horizontal)

[Mandatory]

I participate in board development activities.

Never  
☐

Rarely  
☐

Sometimes  
☐

Usually  
☐

Always  
☐

Page 2 - Question 5 - Rating Scale - One Answer (Horizontal) [Mandatory]

My fellow board members participate in board development activities.				
Never	Rarely	Sometimes	Usually	Always
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Page 2 - Question 6 - Rating Scale - One Answer (Horizontal) [Mandatory]

The organization considers board development a priority.				
Never	Rarely	Sometimes	Usually	Always
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Page 3 - Question 7 - Rating Scale - One Answer (Horizontal) [Mandatory]

The board considers board development a priority.				
Never	Rarely	Sometimes	Usually	Always
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Page 3 - Question 8 - Rating Scale - One Answer (Horizontal) [Mandatory]

I consider board development a priority.				
Never	Rarely	Sometimes	Usually	Always
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Page 3 - Question 9 - Rating Scale - One Answer (Horizontal) [Mandatory]

The board provides regular board development activities.				
Never	Rarely	Sometimes	Usually	Always
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Page 3 - Question 10 - Rating Scale - One Answer (Horizontal) [Mandatory]

The organization provides human resources for board development.				
Never	Rarely	Sometimes	Usually	Always
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Page 3 - Question 11 - Rating Scale - One Answer (Horizontal) [Mandatory]

The organization provides fiscal resources for board development.				
Never	Rarely	Sometimes	Usually	Always
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Page 3 - Question 12 - Rating Scale - One Answer (Horizontal) [Mandatory]

The board provides development in general board roles and responsibilities.				
Never	Rarely	Sometimes	Usually	Always
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Page 4 - Question 13 - Rating Scale - One Answer (Horizontal) [Mandatory]

The board provides development in board evaluation.				
Never	Rarely	Sometimes	Usually	Always
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Page 4 - Question 14 - Rating Scale - One Answer (Horizontal) [Mandatory]

The board provides development in corporate (organizational) evaluation.				
Never	Rarely	Sometimes	Usually	Always
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Page 4 - Question 15 - Rating Scale - One Answer (Horizontal) [Mandatory]

The board provides development in corporate operations.				
Never	Rarely	Sometimes	Usually	Always
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Page 4 - Question 16 - Rating Scale - One Answer (Horizontal) [Mandatory]

The board provides development in corporate sustainability.				
Never	Rarely	Sometimes	Usually	Always
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Page 4 - Question 17 - Rating Scale - One Answer (Horizontal) [Mandatory]

The board provides development in ethics.				
Never	Rarely	Sometimes	Usually	Always
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Page 4 - Question 18 - Rating Scale - One Answer (Horizontal) [Mandatory]

The board provides development in facilitation skills.				
Never	Rarely	Sometimes	Usually	Always
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Page 5 - Question 19 - Rating Scale - One Answer (Horizontal) [Mandatory]

The board provides development in financial management.				
Never	Rarely	Sometimes	Usually	Always
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Page 5 - Question 20 - Rating Scale - One Answer (Horizontal) [Mandatory]

The board provides development in fundraising.				
Never	Rarely	Sometimes	Usually	Always
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Page 5 - Question 21 - Rating Scale - One Answer (Horizontal) [Mandatory]

The board provides development in grant writing.				
Never	Rarely	Sometimes	Usually	Always
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Page 5 - Question 22 - Rating Scale - One Answer (Horizontal) [Mandatory]

The board provides development in laws affecting the non-profit organization.				
Never	Rarely	Sometimes	Usually	Always
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Page 5 - Question 23 - Rating Scale - One Answer (Horizontal) [Mandatory]

The board provides development in leadership.				
Never	Rarely	Sometimes	Usually	Always
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Page 5 - Question 24 - Rating Scale - One Answer (Horizontal)

[Mandatory]

The board provides development in management.

Never

☐

Rarely

☐

Sometimes

☐

Usually

☐

Always

☐

Page 6 - Question 25 - Rating Scale - One Answer (Horizontal)

[Mandatory]

The board provides development in policy development.

Never

☐

Rarely

☐

Sometimes

☐

Usually

☐

Always

☐

Page 6 - Question 26 - Rating Scale - One Answer (Horizontal)

[Mandatory]

The board provides development in public/community relations.

Never

☐

Rarely

☐

Sometimes

☐

Usually

☐

Always

☐

Page 6 - Question 27 - Rating Scale - One Answer (Horizontal)

[Mandatory]

The board provides development in real estate management.

Never

☐

Rarely

☐

Sometimes

☐

Usually

☐

Always

☐

Page 6 - Question 28 - Rating Scale - One Answer (Horizontal)

[Mandatory]

The board provides development in relationships with corporate staff.

Never

☐

Rarely

☐

Sometimes

☐

Usually

☐

Always

☐

Page 6 - Question 29 - Rating Scale - One Answer (Horizontal)

[Mandatory]

The board provides development in short-term (annual) planning.

Never

☐

Rarely

☐

Sometimes

☐

Usually

☐

Always

☐

Page 6 - Question 30 - Rating Scale - One Answer (Horizontal)

[Mandatory]

The board provides development in long-term (strategic) planning.

Never

☐

Rarely

☐

Sometimes

☐

Usually

☐

Always

☐

Page 7 - Question 31 - Rating Scale - One Answer (Horizontal)

[Mandatory]

The board provides development in technical management (management of change).

Never

☐

Rarely

☐

Sometimes

☐

Usually

☐

Always

☐

Page 7 - Question 32 - Rating Scale - One Answer (Horizontal)

[Mandatory]

The board members offer suggestions for board development activities.

Never

☐

Rarely

☐

Sometimes

☐

Usually

☐

Always

☐

Page 7 - Question 33 - Rating Scale - One Answer (Horizontal)

[Mandatory]

The board members apply information learned in development activities to corporate governance duties.

Never

☐

Rarely

☐

Sometimes

☐

Usually

☐

Always

☐



PART TWO - BOARD APPOINTMENT EXPERIENCE

Directions: Please select the appropriate response(s).

What were the reasons for your non-profit board appointment? (Select all that apply.)

- ☐ Advocacy expertise
- ☐ Financial expertise
- ☐ Fundraising expertise
- ☐ Grant writing expertise
- ☐ Management expertise
- ☐ Contacts/Network
- ☐ Gender
- ☐ Race
- ☐ Other (Please specify.)

How long have you been a non-profit board member? (Select one.)

- ☐ Less than 1 year
- ☐ 1-5 years
- ☐ 6-10 years
- ☐ 11-15 years
- ☐ 16-20 years
- ☐ 21 or more years

How many non-profit boards have you served on? (Select one.)

- ☐ 1-3
- ☐ 4-6
- ☐ 7-9
- ☐ 10-12
- ☐ 13 or more

In what role(s) have you ever served as a non-profit board member? (Select all that apply.)

- ☐ Board member
- ☐ Board chair
- ☐ Board vice-chair
- ☐ Board secretary
- ☐ Board treasurer
- ☐ Board committee chair
- ☐ Other (Please specify.)

What specific areas of board development would you like offered? (Select all that apply.)

- ☐ Board roles and responsibilities
- ☐ Board and corporate evaluations
- ☐ Corporate operations
- ☐ Ethics
- ☐ Facilitation of groups/meetings
- ☐ Financial management/fundraising/grant writing
- ☐ Laws affecting non-profit organization
- ☐ Leadership
- ☐ Management
- ☐ Policy development
- ☐ Public/community relations
- ☐ Real estate management
- ☐ Short- and long-term planning
- ☐ Technical management
- ☐ Other (Please specify.)

What learning delivery methods would you prefer for board development activities? (Select all that apply.)

- ☐ Classroom
- ☐ Coaching/Mentoring
- ☐ Computer-based (compact disc, digital video disc)
- ☐ Conference/Seminar
- ☐ Group (small/large)
- ☐ Self-paced (electronic, books, journals, tapes)
- ☐ Teleconference
- ☐ Videoconference
- ☐ Web-conference
- ☐ Other (Please specify.)

Which of the following areas of board development have you applied to your employment or with the non-profit organization? (Select all that apply.)

- ☐ Board roles and responsibilities
- ☐ Board and corporate evaluations
- ☐ Corporate operations
- ☐ Ethics/Laws affecting non-profit organizations
- ☐ Facilitation of groups/meetings
- ☐ Finances/fundraising/grant writing
- ☐ Leadership and management
- ☐ Real estate management
- ☐ Short- and long-term planning
- ☐ Technical management
- ☐ Other (Please specify.)

Page 9 - Question 41 - Yes or No

[Mandatory]

Do you have a job description for your board position(s)?

- ☐ Yes
- ☐ No

Page 9 - Question 42 - Yes or No

[Mandatory]

Do you receive an annual evaluation of your board performance according to your job description?

- ☐ Yes
- ☐ No

Page 9 - Question 43 - Yes or No

[Mandatory]

Has your board development opened other opportunities for you?

- ☐ Yes
- ☐ No

Page 9 - Question 44 - Yes or No

[Mandatory]

Have you ever been appointed to a for-profit board?

- ☐ Yes
- ☐ No [\[Skip to 10\]](#)

Page 10 - Question 45 - Choice - One Answer (Bullets)

[Mandatory]

If yes, how long was your appointment? (Select one.)

- ☐ Less than 1 year
- ☐ 1-5 years
- ☐ 6-10 years
- ☐ 11-15 years
- ☐ 16-20 years
- ☐ 21 or more years

Page 10 - Heading

PART THREE - DEMOGRAPHIC INFORMATION  
Directions: Please select the appropriate(s).

Page 10 - Question 46 - Choice - One Answer (Bullets)

[Mandatory]

How large is the organization in which you are a non-profit board member? (Select one.)

- ☐ Less than 10 employees
- ☐ 10-19 employees
- ☐ 20-99 employees
- ☐ 100-499 employees
- ☐ 500 or more employees

Page 10 - Question 47 - Choice - One Answer (Bullets)

[Mandatory]

How large is the non-profit board on which you serve? (Select one.)

- ☐ 1-4 members
- ☐ 5-9 members
- ☐ 10-14 members
- ☐ 15-19 members
- ☐ 20 or more members

Page 10 - Question 48 - Choice - One Answer (Bullets)

[Mandatory]

What industry do you work in primarily? (Select one.)

- ☐ Administration
  - ☐ Education
  - ☐ Finance/Accounting
  - ☐ Government
  - ☐ Health Care
  - ☐ Hospitality
  - ☐ Human Resources
  - ☐ Information Technology
  - ☐ Marketing/Real Estate/Sales
  - ☐ Other (Please specify.)
- 

Page 11 - Question 49 - Choice - One Answer (Bullets)

[Mandatory]

What is your gender?

- ☐ Male
- ☐ Female

Page 11 - Question 50 - Choice - One Answer (Bullets)

[Mandatory]

What is your race? (Select one.)

- ☐ American Indian or Alaskan Native
  - ☐ Asian
  - ☐ Black
  - ☐ Latino
  - ☐ Pacific Islander
  - ☐ White
  - ☐ Other (Please specify.)
- 

Page 11 - Question 51 - Open Ended - One Line

[Mandatory]

What is your age at your last birthday? (Fill in the blank.)

---

Page 11 - Question 52 - Choice - One Answer (Bullets)

[Mandatory]

What is your highest educational level completed? (Select one.)

- ☐ Less than High School

- ☐ High School Diploma/General Equivalency Diploma
  - ☐ Vocational-Technical Diploma
  - ☐ Some College
  - ☐ Associate's Degree
  - ☐ Bachelor's Degree
  - ☐ Master's Degree
  - ☐ Doctoral Degree
  - ☐ Other (Please specify.)
- 

**Thank You Page**

Thank you taking time from your busy schedule to participate in our survey!



**Screen Out Page**

(Kiosk - Send survey taker to introduction)

**Over Quota Page**

(Kiosk - Send survey taker to introduction)

**Survey Closed Page**

We appreciate your interest in our survey on board development. However, the survey is now closed.

## **APPENDIX B**

### **REQUEST FOR BOARD MEMBER SURVEY**

From: Gail Hollins <gholli1@tigers.lsu.edu>  
To: E-mail address of Chief Executive Officer and/or Board Chair  
Date: Tue, Nov 3, 2009  
Subject: Request for Board Member Survey  
Mailed by: tigers.lsu.edu

Dear Mr. /Ms. \_\_\_\_\_:

I am currently a doctoral student at Louisiana State University and a present and former member of non-profit boards who is interested in researching the views of non-profit board members in Louisiana. For my doctoral dissertation in Human Resource Education and Workforce Development, I would like to work with you and your organization to survey one of its board members.

I believe my research will contribute to the body of knowledge and best practices in the non-profit sector, and in the domains of business, education, and government. I feel the research will correspond well with Louisiana Governor Bobby Jindal's mandate to emphasize workforce development in Louisiana. In addition, I would be pleased to share the findings and implications of this timely research with you in a report or in a future meeting.

Finally, I would appreciate an opportunity to meet or speak with you at your convenience to discuss our possible collaboration. Please contact me ([gholli1@lsu.edu](mailto:gholli1@lsu.edu) or 225/324-8866) or Dr. Krisanna L. Machtmes, Associate Professor ([machtme@lsu.edu](mailto:machtme@lsu.edu) or 225/578-7844). I thank you in advance for your time and consideration.

Sincerely,  
Gail A. Hollins, MS, MS, RN,BC  
Doctoral Student  
School of Human Resource Education and Workforce Development  
Louisiana State University

## APPENDIX C

### REQUEST FOR PARTICIPATION IN RESEARCH SURVEY

#### Request for Participation in Research Survey

Boards of directors play a pivotal role in the life of non-profit organizations. Thus, it is essential that they operate effectively. Provision of a board development program will promote organizational performance.

The School of Human Resource Education and Workforce Development of Louisiana State University (L.S.U.) is seeking board members of non-profit organizations in Louisiana to participate in an **online survey** on board development. We are looking for participants (i.e., 25 percent of your board members) who are willing to take approximately 15 minutes to complete the survey in **January 2010**. Responses will be confidential.

Your involvement will help us better understand non-profit board members and their views on board development, and contribute to the knowledge and best practices of the non-profit sector. Also, we will provide a report of the research findings to your organization. If you are interested or have further questions, please contact Gail Hollins or Dr. Krisanna Machtmes. We deeply appreciate your participation!

Sincerely,

**Gail Hollins, MS, MS, BSN, RN,BC**

Ph.D. Candidate

School of Human Resource Education and Workforce Development

[gholli1@lsu.edu](mailto:gholli1@lsu.edu)

225-324-8866

**Dr. Krisanna Machtmes**

Associate Professor

School of Human Resource Education and Workforce Development

[machtme@lsu.edu](mailto:machtme@lsu.edu)

225-578-7844

Louisiana State University

GH/November 2009

**APPENDIX D**  
**LETTER TO SURVEY PARTICIPANTS**  
**HOLLINS BOARD DEVELOPMENT SURVEY**

January 12, 2010

Dear Board Members:

I appreciate your voluntary participation in our survey of non-profit board members in Louisiana and their views on board development in their organizations. The results of the 15-minute survey will be used to educate the non-profit sector on the importance of board development in improving individual and organizational performance.

Your responses will remain confidential. No personal information will be associated with your responses in any reports of this data. Completing this survey is your consent to participate in the study, which has been approved by the Louisiana State University's Institutional Review Board (LSU-IRB). If you have questions, please contact Dr. Robert Mathews, IRB Chair at [irb@lsu.edu](mailto:irb@lsu.edu) or 225-578-8692. Also, if you need special accommodations, please contact me at [gholli1@lsu.edu](mailto:gholli1@lsu.edu) or 225-324-8866.

To access the survey, please click on the link below to enter the website. You may also copy and paste the survey link into Internet browser.

**Survey Link:** <http://www.zoomerang.com/Survey/?p=WEB22A43WHAU42>

Again, I thank you for your time and cooperation!

Best regards,  
Gail A. Hollins, PhD(c), MS, MS, BSN, RN,BC  
School of Human Resource Education & Workforce Development  
Louisiana State University



## **APPENDIX E**

### **FIRST REMINDER (E-MAIL) TO SURVEY PARTICIPANTS**

January 22, 2010

Dear Chief Executive Officers, Board Chairs, and Board Members:

We appreciate your interest in an online survey about the views of non-profit board members in Louisiana on board development (i.e., board education/training) needs. Our survey, which is supported by the School of Human Resource Education and approved by the Institutional Review Board, both of Louisiana State University, is designed to provide key information to non-profit organizations.

Please accept our earnest thanks if you have previously responded. If you have not, please do so as soon as possible. The survey link was sent to Chief Executive Officers and/or Board Chairs on January 12, 2010. We would appreciate hearing from you by January 31, 2010.

Again, your responses will remain confidential. If you did not receive the survey or have misplaced it, you may access it by 1) clicking on the link below to enter the website, or 2) copying and pasting the link into your Internet browser.

#### **Survey Link:**

<http://www.zoomerang.com/Survey/?p=WEB22A43WHAU42>

Should you have questions or need special accommodations, please contact us at [gholli1@lsu.edu](mailto:gholli1@lsu.edu) or (225) 324-8866. Thank you again for your participation!

Sincerely,

Gail A. Hollins  
Doctoral Candidate  
Louisiana State University

## **APPENDIX F**

### **SECOND REMINDER (E-MAIL) TO SURVEY PARTICIPANTS**

From: Gail Hollins  
Sent: Feb 3, 2010 12:01 AM  
To: [gholli1@tigers.lsu.edu](mailto:gholli1@tigers.lsu.edu)  
Subject: Reminder - Board Development Survey

Dear Executive Directors,

Thank you again for agreeing to forward the weblink to an online survey on board development (i.e., board training/education) to your board members. Also, I appreciate you encouraging your board members to complete this important survey as soon as possible.

---

Dear Board Chairs and Board Members,

Thank you for agreeing to participate in a short online survey on board development; that is, board education/training in non-profit organizations in Louisiana. I appreciate each of you who have completed and sent us your survey. If you have partially completed or have not yet taken the survey, please take a few minutes to complete it through the survey weblink below. Your responses are confidential and crucial to my research.

<http://www.zoomerang.com/Survey/?p=WEB22A43WHAU42>

If you have questions or are unable to complete the survey, please contact me ([gholli1@lsu.edu](mailto:gholli1@lsu.edu); 225-324-8866) or Dr. Krisanna Machtmes, Associate Professor ([machtme@lsu.edu](mailto:machtme@lsu.edu); 225-578-7844). Again, thank you for your participation.



## APPENDIX G

### THIRD REMINDER (E-MAIL) TO SURVEY PARTICIPANTS

February 11, 2010

Dear Board Member,

St. Valentine's Day is almost here! I would *LOVE* for you to complete my Board

Development (Training) Survey! If you do, you will  forever! Have a ;

do your part (please...)!

**Survey link:** <http://www.zoomerang.com/Survey/?p=WEB22A43WHAU42>

Warm regards,

**Gail Hollins**

Doctoral Student

Louisiana State University

## APPENDIX H

### NCI HUMAN PARTICIPANT PROTECTIONS EDUCATION CERTIFICATE

Human Participant Protections Education for Research Teams

Page 1 of 1



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Human Participant Protections Education for Research Teams

#### Completion Certificate

This is to certify that

**gail hollins**

has completed the **Human Participants Protection Education for Research Teams** online course, sponsored by the National Institutes of Health (NIH), on 10/23/2006

This course included the following:

- key historical events and current issues that impact guidelines and legislation on human participant protection in research.
- ethical principles and guidelines that should assist in resolving the ethical issues inherent in the conduct of research with human participants.
- the use of key ethical principles and federal regulations to protect human participants at various stages in the research process.
- a description of guidelines for the protection of special populations in research.
- a definition of informed consent and components necessary for a valid consent.
- a description of the role of the IRB in the research process.
- the roles, responsibilities, and interactions of federal agencies, institutions, and researchers in conducting research with human participants.

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10/23/2006

## APPENDIX I

### IRB EXEMPTION FROM INSTITUTIONAL OVERSIGHT APPROVAL #E4885

**Application for Exemption from Institutional Oversight**

Unless qualified as meeting the specific criteria for exemption from Institutional Review Board (IRB) oversight, ALL LSU research/ projects using living humans as subjects, or samples, or data obtained from humans, directly or indirectly, with or without their consent, must be approved or exempted in advance by the LSU IRB. This Form helps the PI determine if a project may be exempted, and is used to request an exemption.

**LSU**

Institutional Review Board  
Dr. Robert Mathews, Chair  
131 David Boyd Hall  
Baton Rouge, LA 70803  
P: 225.578.8692  
F: 225.578.6792  
irb@lsu.edu  
lsu.edu/irb

– Applicant, Please fill out the application in its entirety and include the completed application as well as parts A-E, listed below, when submitting to the IRB. Once the application is completed, please submit two copies of the completed application to the IRB Office or to a member of the Human Subjects Screening Committee. Members of this committee can be found at <http://www.lsu.edu/screeningmembers.shtml>

– A Complete Application Includes All of the Following:  
(A) Two copies of this completed form and two copies of part B thru E.  
(B) A brief project description (adequate to evaluate risks to subjects and to explain your responses to Parts 1&2)  
(C) Copies of all instruments to be used.  
\*If this proposal is part of a grant proposal, include a copy of the proposal and all recruitment material.  
(D) The consent form that you will use in the study (see part 3 for more information.)  
(E) Certificate of Completion of Human Subjects Protection Training for all personnel involved in the project, including students who are involved with testing or handling data, unless already on file with the IRB. Training link: (<http://phrp.nihtaining.com/users/login.php>)

1) Principal Investigator:  Ph:  Rank   
Dept:  Ph:  E-mail:

2) Co Investigator(s): please include department, rank, phone, and e-mail for each  
\*If student, please identify and name supervising professor in this space

3) Project Title:

4) Proposal? (yes or no)  If Yes, LSU Proposal Number   
Also, if YES, either ☐ This application completely matches the scope of work in the grant  
OR ☐ More IRB Applications will be filed later

5) Subject pool (e.g. Psychology students)   
\*Circle any "vulnerable populations" to be used: (children <18; the mentally impaired, pregnant women, the ages, other). Projects with incarcerated persons cannot be exempted.

6) PI Signature  Date  (no per signatures)

\*\* I certify my responses are accurate and complete. If the project scope or design is later changes, I will resubmit for review. I will obtain written approval from the Authorized Representative of all non-LSU institutions in which the study is conducted. I also understand that it is my responsibility to maintain copies of all consent forms at LSU for three years after completion of the study. If I leave LSU before that time the consent forms should be preserved in the Departmental Office.

Screening Committee Action: Exempted ☒ Not Exempted ☐ Category/Paragraph   
Reviewer  Signature  Date

**Part 1: Determination of "Research" and Potential For Risk**

- This section determines whether the project meets the Department of Health and Human Services (HSS) definition of research involving human subjects, and if not, whether it nevertheless presents more than "minimal risk" to human subjects that makes IRB review prudent and necessary.

## APPENDIX J

### CRITIQUING ELEMENTS FOR QUESTIONNAIRE/SURVEY

#### Critiquing Elements for Questionnaire/Survey

***\*Directions:** Please use these elements as a guide in judging the survey, which will be converted to an online survey in the near future. Your candid responses are greatly appreciated and will be used to improve the survey!*

**- Gail Hollins, Doctoral Candidate, Louisiana State University**

---

#### **1. Wording of questions**

- Are questions clear? Simple? Understandable? Are the terms used in the questions ones in which a board member should be familiar? Is the context of the questionnaire appropriate for a board member? Are there any words that could be construed as offensive, biased, and/or negative?

#### **2. Structure of questions**

- Are questions grammatically sound – i.e., subject-verb-object agreement? Can questions be easily reasoned? Does a question ask too much information for one question?

#### **3. Response alternatives**

- Are answer responses appropriate for the question? Are there too many, too few, or enough response alternatives?

#### **4. Order of questions**

- Are questions asked in an orderly, sensible manner?

#### **5. Instructions for taking the questionnaire**

- Are instructions to survey participant simple, clear, and easily understandable? Is the tone of instructions courteous and respectful?

#### **6. Navigational rules of the questionnaire**

- Is it easy to move from one question to another? From one section to another? From one page to another? Can the questionnaire be reasonably completed in the amount of time stated in the instructions?

## APPENDIX K

### PILOT STUDY RESPONDENTS' COMMENTS ABOUT THE HOLLINS BOARD DEVELOPMENT SURVEY

Board Member	Comments
Board Member 1	Fine – great job! I had no problems doing [the] survey.
Board Member 2	I feel the survey is very good! It is easy to understand and complete. The questions and instructions are orderly and straightforward. A board member should find the survey topics, questions, and response choices appropriate. Please check Questions 35 and 37; they are identical.
Board Member 3	<p><b>Wording of Questions:</b> Questions were clear, concise and appropriate. As I begin answering the questions, I found myself wondering whether or not I should be answering based upon the board the doctoral candidate knows me from or based upon my entire board experience. Each board is different with varying strengths and weaknesses. I decided to try and respond based on the board the candidate knows.</p> <p><b>Structure of Questions:</b> As stated above, the questions may have been better served if they addressed overall board experience. Each question was short and to the point. There was one duplication - Questions 35 and 37 are the same. Also, maybe a few questions exploring the specifics of what type of board development training members received and what the board member thought of it.</p> <p><b>Response Alternatives:</b> There were enough response alternatives.</p> <p><b>Order of Questions:</b> Sensible flow; there seemed to be an organization, then board, then self/I approach.</p> <p><b>Instructions for Taking the Questionnaire:</b> Clarification as to the perspective from which to answer the questions. See #1 and #2 above.</p> <p><b>Navigational Rules of the Questionnaire:</b> Self-checking formatting would have been useful and will probably exist when the survey is web-based. See how I responded to #34 - #38 compared with #39 moving forward. Otherwise, navigation was fine.</p>

Table Continued

Board Member 4	<p><b>Wording of Questions:</b> The questions are clear and fairly simple. There were a few times I had to reread the question to make sure which it was referring to with the board versus the organization. The terms used are words that most board members should be familiar with. The context is probably appropriate for most boards; however, [name of organization] hasn't really gotten to these types of developments just yet. I think it will be in the works though.</p> <p><b>Structure of Questions:</b> Yes, it seems to be grammatically sound.</p> <p><b>Response Alternatives:</b> I think the responses were appropriate for each question.</p> <p><b>Order of Questions:</b> Yes [i.e., questions asked and organized in an orderly, sensible manner].</p> <p><b>Instructions for Taking the Questionnaire:</b> Yes [i.e., instructions to survey participant simple, clear, and easily understandable; tone of instructions courteous and respectful].</p> <p><b>Navigational Rules of the Questionnaire:</b> It is easy to move except when I would have to reread. There was one [question] that was repeated. Yes, it can be completed within the time stated.</p>
Board Member 5	The questions were challenging – they made me think. I couldn't just go down the survey. The instructions were clear and easy to understand.
Board Member 6	I suggest removing the term “candid” because it implies that the person will not be open and/or honest about their response. Consider deleting #34 (reasons for board member's appointment to the board) and #40 (preferred learning delivery methods of board member for board development activities).
Board Member 7	My pleasure to help, Gail. Great job! Professional and well-organized...and as always, has your hand of excellence upon it! Question 37 is [a] repeat of Question 35.
Board Member 8	Well done, Miss Hollins.
Board Member 9	The topics for the questionnaire are suitable for board members. I enjoyed the variety of topics under Board Development Activities. I liked the presence of the researcher's contact information for any questions and for participants who may need special accommodations. I found the survey interesting, easily understandable, very organized, and easily navigable. Also, all instructions were simple, clear, and direct. The survey and all instructions had sound grammatical structure. Questions 35 and 37 are the same.
Board Member 10	Questions #35 and #37 are the same.



## APPENDIX L

### SAMPLE SIZE FOR CONTINUOUS AND CATEGORICAL DATA COCHRAN'S (1977) FORMULAS

Continuous Data	Categorical Data
<p style="text-align: center;"><u>Original</u></p> $n_o = t^2 \cdot s^2$ $n_o = \frac{(1.96)^2 \cdot (1.25)^2}{(5) (0.3)^2}$ $n_o = \frac{(3.8416) (1.5625)}{(0.015)^2}$ $n_o = \frac{6.0025}{0.0225}$ $n_o = 266.777 \text{ or } 267$	<p style="text-align: center;"><u>Original</u></p> $n_o = \frac{t^2 \cdot (p) (q)}{d^2}$ $n_o = \frac{(1.96)^2 \cdot (.5) (.5)}{(.05)^2}$ $n_o = \frac{(3.8416) (0.25)}{.0025}$ $n_o = \frac{0.9604}{.0225}$ $n_o = 384.16 \text{ or } 384$
<p style="text-align: center;"><u>Corrected</u></p> $n = \frac{n_o}{(1 + n_o)}$ $n = \frac{267}{(1 + 267)}$ $n = \frac{267}{150,000}$ $n = \frac{267}{1.00178}$ $n = 266.525 \text{ or } 267$ <p>(.05 X 150,000 = 7,500. Sample size is less than 5% of the population.)</p>	<p style="text-align: center;"><u>Corrected</u></p> $n = \frac{n_o}{(1 + n_o)}$ $n = \frac{384}{(1 + 384)}$ $n = \frac{384}{150,000}$ $n = \frac{384}{1.00256}$ $n = 383.019 \text{ or } 383$ <p>(.05 X 150,000 = 7,500. Sample size is less than 5% of the population.)</p>

Table Continued

### Legend

- $t$ =Alpha level; denotes the level of risk the researcher expects to take to know that the true margin of error may exceed the acceptable margin of error. Here, the alpha level is .025 in each tail.
- $s$ =Variance; the estimate of standard deviation in the population.
- $d$ = Margin of error (acceptable) for mean being estimated.
- $n_o$ =Required return sample size according to Cochran's (1977) formula
- $p$ =Estimate of variance
- $q$ =Estimate of variance
- $N$ =Population

Data Variable	Continuity	Ordinality
Age	Categorical	Interval
Gender	Categorical	Nominal
Race	Categorical	Nominal
Highest educational level	Categorical	Ordinal
Length of time on the board	Continuous	Interval
Number of Non-profit Board Appointments	Continuous	Interval
Size of non-profit board	Continuous	Interval
Size of non-profit organization	Continuous	Interval

## **VITA**

Gail Hollins is from Baton Rouge, Louisiana. Her parents are Mr. and Mrs. Alvin Hollins, Sr.; she has one brother and two sisters.

Gail graduated from Baker High School. She obtained a Bachelor of Science degree in nursing from Southeastern Louisiana University in 1984. In addition, she obtained the Master of Science degree in health science and the Master of Science degree in human resource education from Louisiana State University in 1989 and 2009, respectively. Gail is a candidate for the Doctor of Philosophy degree in human resource education from Louisiana State University with an anticipated graduation date of December 2010.

Gail's occupational and volunteer experience includes nursing, teaching, training, consulting, event planning, and professional speaking. Since 1995, she has served on boards of directors and advisory boards of non-profit organizations to provide educational, family, health, human resources, workforce development, and religious services locally, nationally, and internationally. Gail serves as a volunteer in various capacities in community organizations, and is a board trustee and board educator/trainer with a Louisiana non-profit organization. Finally, she is a member of several professional and honor organizations for nursing, training, business, and agriculture.